

## **Portland Utility Board**

April 6, 2021, 3:30 p.m.  
Virtual meeting using Zoom platform  
**Meeting #100**

### **Attendees:**

*PUB Members:* Amy Chomowicz, ex-officio  
Brian Laurent, ex-officio  
Dory Robinson, co-chair  
Gabriela Saldaña-López)  
Heidi Bullock  
Julia DeGraw (arrived ~3:45)  
Kaliska Day  
Karen Y. Spencer  
Karen Williams, co-chair  
Robin Castro  
Theresa Huang  
Sara Petrocine, ex officio

### *Absent:*

Robert Martineau\*  
Tom Liptan\*

\*Notice of absence provided prior to meeting

### *Staff:*

Amy Archer-Masters, Portland Utility Board Analyst, City Budget Office  
Cecelia Huynh, Director of Finance and Support Services, Portland Water Bureau  
Eliza Lindsay, Portland Utility Board Coordinator, City Budget Office  
Gabriel Solmer, Director, Portland Water Bureau  
Jaymee Cuti, Portland Water Bureau  
Jeff Winner, Portland Water Bureau  
Ken Bartocci, Bureau of Environmental Services  
Robert Cheney, City Budget Office  
Yung Ouyang, City Budget Office

### *Public:*

Ana Brophy  
Carol Cushman, League of Women Voters  
Justin Sims  
Lori McFarlane

## **Synopsis, Action Items, Decisions**

In these notes the acronym, PUB, stands for the Portland Utility Board, BES for the Bureau of Environmental Services, and PWB for the Portland Water Bureau.

The Board finalized the budget recommendation letter, reviewed and adopted PUB beliefs, Values, and Anti-Racist Principles, shared various updates, and discussed future meeting topics.

Decisions made include:

- Acceptance of the draft letter with pending edits as discussed with final wording to be completed by PUB staff and Karen W.
- The PUB Beliefs, Values, and Anti-Racist Principles was accepted as drafted. Gaby and Julia will draft shorter messaging for additional purposes. Karen YS will work with PUB staff and the City attorney to draft a reference to the document for PUB bylaws.

### **I. Call to Order**

The Co-Chair called the meeting to order at approximately 3:30 p.m.

Virtual meeting guidelines were briefly reviewed.

### **II. Disclosure of Communications**

Theresa had communication with two staff at PWB regarding the financial assistance program.

Karen W had communications with the City Attorney and PUB staff regarding a PUB virtual community meeting.

Heidi had her usual communications with BES staff related to Portland Harbor.

### **III. Public Comment**

There was no public comment.

### **IV. Approval of Prior Minutes**

The minutes for the March 18, 2021 full Board meeting and the March 11 and March 25 subcommittee meetings were approved as submitted.

### **V. Finalization of PUB Budget Letter**

The draft letter as discussed at the meeting is included in Appendix A.

The Co-chair opened up the meeting by noting that the goal is to finalize the content of the budget recommendation letter. After the budget recommendation letter, the next step is the rate hearing which takes place in May. During the next several PUB meetings, the Board can determine whether there is additional testimony the Board wants to provide during the rate hearing. PUB staff noted that

some years the Board has decided to provide additional input at the rate hearing and in others years the Board has chosen not to if there is not significant new content.

It was noted that the work session with the Mayor was cancelled.

PUB staff introduced the draft letter by noting that they incorporated feedback they received offline. Where the feedback was slightly different from what was discussed at the prior meeting or there was a request for the Board to have additional conversation, or etc. they have flagged it with a comment. The Board then walked through the draft letter.

A PUB member suggested rather than linking to last year's letter, include it as an appendix.

There was discussion of how specific or general to make the rate development section of the letter. A PUB member said they do not object to providing a little more detail than what is in the pink highlighted example. However, rather than make a recommendation of a specific approach, they might suggest that the Bureau explore that approach more to see who might benefit or not while also noting that, in general, a finer scale analysis often tends to highlight inequities, e.g., using a different metric than median or average.

Regarding community engagement for the rate study, the PUB member who introduced the idea of funding a community engagement position related to the rate study said they are fine making a generalized statement of support for funding for expanded community engagement. For them, the important thing is that the investment be made in community engagement, tight budgets notwithstanding.

Another PUB member said they agree with making the statement general, but perhaps with the caveat that there is support to fund a position should the bureau be able to.

There was general agreement to these changes to the rate study section.

After the Board finished walking through the draft letter, PUB staff explained that the next step is to finalize the letter and get it to Council by the end of the week.

Karen W offered to assist with the final wordsmithing.

**VOTE** Karen YS made a motion to accept the draft letter with pending edits as discussed with final wording to be completed by PUB staff and Karen W.

Julia seconded the motion.

There was no public comment.

All present voted Yes: Dory, Karen W, Theresa H, Kaliska, Heidi, Karen YS, Robin, Gabriela, and Julia.

## **VI. PUB Beliefs, Values, and Anti-Racist Principles Review and Adoptions**

A PUB member introduced the topic noting that the impetus behind the values statement was an interaction at a meeting where xenophobic comments were made by a member of the public. They felt personally effected and it was very uncomfortable because no one spoke up. The intention behind the letter is to frontload PUB values and principles before something like that happens again so that Board members can step up and be supportive of folks. They noted that the document could serve as the basis

for future communications around PUB values and anti-racist principles. A short version could be developed to use with various communications.

A PUB member noted that this will serve the Board in a powerful way going forward and help ensure the Board continues to recruit people who are aligned with these values.

A PUB member said they think this is really great and asked if the Board is proposing to adopt it. Will it be incorporated into PUB meetings at the beginning or how will it be used in meetings?

A PUB member shared that they would like this to be adopted into bylaws and also messaged at PUB meetings in some way, perhaps as one of the opening pieces.

A PUB ex officio member shared support for all that has been said and shared that it was very helpful for someone like them who is a product of a very different system to frame what happens in words as harm against people and to make explicit that people like them have a role to play. They also added that having the values will support requests for future trainings.

A PUB member said they agree about the connection to the bylaws. They noted that in developing the document they saw that part of the role of the document was to be educational for new members. They noted that when the public comment happened there were a lot of new Board members and everyone was going what is our role as a Board member especially with a comment from the public. They noted that one of the next steps it to make a more concise statement for use at the beginning of meetings and there is an ask for volunteers for this task.

Julia volunteered to help distill a shorter statement as she is personally interested in honing that skill.

Gaby also volunteered to help shorten the statement.

PUB staff noted that in addition to placing the entire document on PUB's website with a short version for use at the beginning of meetings, a short version could also go out in meeting notices. PUB staff also mentioned that in terms of the bylaws there may be an open question as to whether it is better to put the entire document in the bylaws or simply reference it in the bylaws.

Karen YS noted that it should probably live outside the bylaws and simply be referenced so that in the future it can be easily amended as needed for emerging situations. PUB staff asked Karen YS if she were willing to help in drafting the proposed addition to the bylaws for subsequent review by the Board. Karen YS said yes.

**VOTE** Karen W made a motion to accept the PUB Beliefs, Values, and Anti-Racist principles as drafted with Gaby and Julia to draft shorter messaging for additional purposes and Karen YS to work with PUB staff and the City attorney to draft a reference to the document for PUB bylaws.

Julia seconded the motion

There was no public comment.

All present at the time voted yes: Dory, Karen W, Theresa H, Kaliska, Heidi, Karen YS, Robin, and Julia. (Gaby had had to briefly step away.)

PUB staff will upload the document to the website.

A PUB member asked about sharing this work with other advisory bodies throughout the City who may be thinking about some of the same things and could use PUB's effort/labor without reinventing the wheel.

PUB staff shared there are multiple ways to share with other Boards from PUB members reaching out to other advisory bodies to PUB staff sharing with other advisory body staff.

There was general interest in building bridges with other advisory bodies to share, collaborate, and cross-pollinate.

## **VII. Announcements**

### **PUB virtual community meeting**

A PUB member provided a brief update on the planning for a virtual community meeting. At the planning meeting they discussed being intentional about the audience and wanting to reach a more diverse audience than is typically aware of PUB meetings. There was also discussion of limiting topics to 2-3 due to time limitations. A few topics people might be interested in include sharing about the PUB, topics around climate change, and risk assessment which feeds into climate change. There was also discussion about the possibility of polling community members about what they might be interested in. A hybrid approach of proceeding with planning for a virtual community meeting while also gathering information from community to inform the topic and/or future topics was chosen. Next step tasks were divvied up. There is a second planning meeting tomorrow.

A PUB member added that at one point they did listening sessions with the bureau they work for. The listening session topics were very focused, yet the richest discussion that emerged was simply around the bureau and even more generally the City's processes. There was discussion about how to talk to someone at the City; how things operate; and whether the city was open to trainings for community and other, non-public hearing style community engagement. They noted that it could be useful for folks to know there are community members like PUB who are advocates for community.

### **PUB code changes and stipends**

PUB staff shared that code changes were scheduled for Council on March 24, 2021. Although the code changes were not implementing stipends, they brought forth the issue for the City as a whole. Some concerns were shared by Commissioner Mapps and other Council members around the changes moving forward and the relationship to the Citywide policy and broader issues with that. So, the Mayor opted to pull the proposed code changes back to his office and directed the City Budget Office (CBO) to do some work. Director Kinard has been meeting with Civic Life and will follow-up with Matt Glazewski/Commissioner Mapps' office and Commissioner Hardesty's office as the Commissioner-in-charge of Civic Life. Director Kinard is hopeful that there may be a way to move things forward perhaps by PUB piloting the process for the City as a while.

Once there are more substantive updates, Director Kinard will attend a PUB meeting to share with the Board, perhaps the second meeting in April or in May.

A PUB member asked for clarification on Commissioner Mapps' concerns.

PUB staff answered that the concern he expressed was fairly straightforward. He wanted to make sure PUB was moving in concert with the City-wide process.

A PUB member said they understood that Director Kinard is supportive of PUB offering stipends as a pilot.

PUB staff responded that Director Kinard has been very supportive of finding a path forward; while needing to be conscious of financial impacts Citywide, she also recognizes there are a handful of advisory bodies, such as PUB, that have a significant time and work commitment. Stipends are appropriate especially where they remove barriers for community members who might not otherwise be able to participate.

A PUB member noted that there are already advisory bodies that receive stipends and one of the ways that stipends will assist PUB is in giving PUB legitimacy with community, especially BIPOC communities who invest so much of their time, expertise, and identity into helping the City shape the City's goal.

### **Spring Budget Monitoring Process**

In addition to this being the main budget season, this is also the time that the spring budget monitoring process happens. CBO is finishing up their analyses. PUB staff will share information via email.

### **Administrative Review Committee (ARC) Report Backs**

A PUB member shared that they participated in an ARC in November and February. Although they were slightly different situations, the outcomes were similar. The one in November involved a situation where there were two dwellings on one meter and the financial assistance was taken away which adversely affected the customer's ability to pay. The financial assistance was reinstated. The one in February involved a death in the family and someone else living there who apparently invited others in. There was a huge bill, especially through the summer. The customer is trying to close out the estate of the family member who passed and pay up bills. They did not feel comfortable to approach the people using the property. The customer requested financial relief. The decision was to review prior use history and redo the bill based on what would have been more typical usage.

A PUB member shared that some of these complicated examples would be good to document with confidentiality maintained, for training of future staff who are going to be running or participating in ARC.

### **PUB Recruitment**

PUB recruitment is live and a handful of applications are trickling in. Please keep sharing out through your networks.

### **Informational materials**

In addition to Spring Budget Monitoring Process, PUB staff will share some basic STEP-CIP updates and also some relatively recent customer and stakeholder surveys as an FYI.

## **VIII. Future Meeting Topics**

As budget season winds down, it is an opportunity to look out towards the summer. The list of potential topics shared via screen shared included:

- PWB plans to resume collections – general interest, for April 15 meeting
- Rate hearing, Spring BMP

- STEP-CIP updates
- Filtration project updates (timely for May/June meetings) – general interest
- Intersection of bureaus’ work and houselessness (June/summer?) – general interest
  - Amy C, ex officio member, is taking the lead in BES’ response to houselessness and is happy to give a report. Right now, they are working on a general strategy so in a couple of meetings will probably have more to share.
- What the bureaus are doing to identify and address inequitable policies, practices, programs
- What are the bureaus doing to hire and retain BIPOC staff? – general interest
- PWB performance measures (summer?)
- Comprehensive study (summer)
- Tree Program/Urban Forestry – general interest in updates on the plans to transfer BES program to PPR
- Process – Communications, information gathering, how to communicate with bureaus, community, and each other. Suggested for prior to summer
- Internship Program reinstatement – PUB member suggested this might combine with the hiring/retaining of BIPOC staff topic

Gaby shared that it was a joint effort to craft the document between her and Karen YS and that she looks forward to working with Julia and sharing with other advisory bodies who may be working on something similar. Gaby asked Julia and PUB staff to briefly stay after the meeting to find a time to work on drafting a short version.

#### **IX. Process update**

The Co-chair shared one process update. If you have questions that you would like to ask the bureau or you are doing research, instead of going directly to the Bureaus, it really helps the Board for the sake of consolidating the Board’s efforts and documenting, to go to PUB staff with those questions.

#### **X. Next meeting**

Tuesday, April 15, 2021, 11:00 a.m.

Topics include

- PWB plans to resume collections – Updates and Q&A
- Urban Flood Safety and Water Quality District
- Updates

The meeting adjourned at approximately 5:08 p.m.

## **Appendix A: Draft Budget Letter**



**Members:**

**Dory Robinson, co-chair**

**Karen Williams, co-chair**

**Heidi Bullock**

**Robin Castro**

**Kaliska Day**

**Julia DeGraw**

**Theresa Huang**

**Tom Liptan**

**Robert Martineau**

**Gabriela Saldaña-López**

**Karen Y. Spencer**

**Ex-officio Members:**

**Amy Chomowicz**

**Brian Laurent**

**Sara Petrocine**

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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 2021-22 Requested Budgets

Date: April 6, 2021

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 significant support we receive from 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, reviewing analyses, building the foundation needed to understand the complex budgets for both bureaus, providing feedback, and considering the requests in balance with the PUB's values and workplan frames. This is our second letter during this budget cycle and summarizes our recommendations to Council on the bureaus' FY 2021-22 Requested Budgets and priorities.

**FY 2021-22 Requested Budgets**

The Bureau of Environmental Service's (BES) FY 2021-22 budget request includes \$410.9 million in operating and capital expenditures in the next year, with no change in positions. There are no decision packages to consider. The total rate of increase for the typical single-family household to support the bureau's requested budget would be 3.15%.

The Portland Water Bureau's (PWB) FY 2021-22 budget request includes \$273.1 million for operating and capital expenditures for the next year, with no change in positions. The decision packages include a small General Fund reduction package and a request for \$1.5 million General Fund for American Disability Act (ADA) compliance to remove barriers at PWB properties for recreational purposes. The total rate of increase for the typical single-family household to support the bureau's requested budget would be 7.8%.

Including the proposed rate of increase for both the PWB and BES, the combined monthly utility increase would be 4.8%. This results in a typical

single-family residential bill increasing by \$5.95 from \$122.74 per month up to \$128.69 per month. The final rate of increase will depend on the items that are approved by City Council through the budget process.

### **Affordability and Financial Assistance**

The PUB remains concerned about the affordability of water and sewer rates and understands there is a delicate balance between affordability and the capital investments needed for long term infrastructure maintenance. Although both bureaus met budget guidance with their budget requests, the resulting 4.8% combined increase could prove unaffordable to many Portlanders and could disparately impact residents that already bear the brunt of structural inequities. We are also concerned about how the \$20 million dollars of accounts in arrears may affect BES and Water bureau services, staffing, and rates and therefore could impact capacity to expand and promote financial assistance programs.

#### Financial Assistance Programs

Improvements to increase visibility and maximize impact of the financial assistance programs are even more essential as financial circumstances for many Portlanders have worsened with the pressures of the pandemic. Last year the PUB provided advice on some key areas for improvements to the financial assistance programs including; suggestions regarding accessibility of information, marketing and outreach opportunities, leveraging resources of related programs, addressing administrative challenges and improving data tracking and analysis ([see April 1, 2020 letter to Council for more detail](#)). The PUB recognizes the pandemic may have delayed investigating and responding to some of these suggestions and this year we provide some complements to the earlier recommendations. The PUB appreciates the efforts made by the bureaus to mitigate customer financial impacts and supports the expansion of critical financial assistance programs including the increase to \$250,000 for fixture repairs and the continuation of \$600,000 for rental assistance.

The PUB understands there may be lower utilization than expected of some components of the financial assistance programs and recommends the bureaus continue to address the lack of awareness of these critical resources, as well as other incentive programs such as BES's Clean River Rewards. The bureaus should enhance coordination across programs and with other bureaus, building on successful practices to improve outreach efforts. The PUB recommends increasing the use of diverse outlets to provide more accessible information and in different languages. The bureaus have a very positive partnership with Home Forward that helped address some of the gaps in the assistance programs but also has limitations. The bureaus could further their reach within the community by building trust with other organizations to expand partnerships, such as exploring connection with effective regional outreach efforts such as local county libraries or other public facing partners. The recent PWB small business relief program had significant success with strategic outreach that could be utilized by the financial assistance programs to increase impact, including use of multi-lingual mailers, Community Engagement Liaisons to do outreach in specific linguistic and cultural communities, and advertisements in resources that reach diverse communities.

The bureaus have made significant efforts in recent years to participate in a range of community events to broaden their outreach. The PUB commends this approach but also recognizes that there could still

**Commented [A1]:** For consideration, added in reference to the more detailed recommendations from last year's letter. When submitted it was at start of pandemic but did have some detail that still connects to current discussion.

be barriers for many to feel comfortable approaching information tables at events, particularly for Black, Indigenous, People of Color, and people that primarily speak a language other than English. The PUB recommends that the bureaus explore ways to increase their cultural representation at outreach events, including use of Community Engagement Liaisons when appropriate, to build on their efforts to remove barriers for Portlanders that may not be aware of the programs and resources available.

The PUB supports the City Budget Office recommendation for utility bureaus to promote the voucher program for multi-family dwellings administered by the Portland Housing Bureau to increase access for those with the greatest need. We also recommend the bureaus increase program flexibility of resources to ensure usage that better reflects the needs in the community. For example, if demand remains low in the voucher program, we suggest modifications to reallocate funds to other financial assistance programs with higher demand. The PUB anticipates that increased awareness and use of potential discounts and resources may allow struggling customers to pay partial bills, also improving revenues and helping the bureaus reduce amounts in arrears.

#### Small Business Relief

The PUB appreciated the opportunity to engage in the development and implementation of small business relief grants (SPUR) in 2020 and is monitoring potential legislative efforts to provide state-level resources that could complement local efforts. The PUB is eager to advance the goals of the SPUR program and recommends another round of SPUR grants be funded, with a continued focus on short term relief for Black, Indigenous, People of Color (BIPOC) and women owned businesses to support businesses most negatively impacted by the pandemic.

#### Rate Development

The PUB also recognizes that the available programs cannot reach every Portlander that needs utility rate assistance. We encourage BES to expeditiously complete the rate study that may provide another avenue to address escalating stormwater rates and the inequities of existing rate methodology. The PUB acknowledges that the reduction to the rate study budget next year is not indicative of reduced priority for this work but just a shift due to the delayed timing. The PUB supports the community engagement position related to the rate study and is eager to provide feedback in the coming year, particularly as BES expands their engagement efforts.

The PUB recognizes that this is a tough time for residents and businesses and is especially harder for people who are the most impacted by this public health crisis, particularly Black, Indigenous and People of Color and other historically underrepresented communities. It is our job to make sure that the bureaus are providing help to people who are really in need and ensure that no one is left out. Affordability will remain a focus of many future discussions and recommendations.

#### Employee Development and Investment

The PUB recognizes that employees are a critical resource that requires investment and focus to ensure that the bureaus are developing and nurturing a sustainable and equitable employee culture. The PUB has previously supported the addition of positions at both bureaus for a more coordinated focus on employee culture and investments that advance the equity and strategic plans.

**Commented [AA2]:** The remainder of this section was adjusted from original talking points based on TH's subsequent conversations with the bureau that allowed further refinement of the recommendations.

**Commented [AA3]:** Member requests discussion of issue provided in prior document – suggest getting agreement to include that an average rate for stormwater is not equitable based on what we know today.

Prior decision was to include something general - could still keep general but also flag area of future interest such as adding at the end "...methodology, for example shifting private property stormwater fees to a more equitable calculation of actual impervious areas rather than using an average."

**Commented [AA4R3]:** Suggestion that BES explore this idea, better understand benefits/impacts. Less specific recommendation. Looking at finer scale rather than an average tends to highlight inequities, like with median income. Concept moving in right direction, look more deeply at this issue.

**Commented [AA5]:** One member suggested including, another suggested not making a statement about the position indicating that BES has other engagement staff for this work. Some options:

- Include support for position
- Remove support for position
- Change to be silent about position with something like "The PUB supports expanded community engagement related to the rate study and..."

**Commented [AA6R5]:** KW okay with generalized statement, investments being made in the right place so opportunity to invest in position for community engagement seems like the right place. Emphasize investment in position, 2020 was a tough year.

The bureaus have responsibly addressed planned reductions in revenues by identifying efficiencies, cost-containment and savings, including holding positions vacant to reduce expenses. We commend this approach but also recognize the work has not decreased and therefore holding vacancies can increase workload burdens and negatively impact remaining staff. The PUB encourages the bureaus to monitor workload and consider filling vacancies if the revenues come in higher than expected.

Beyond monitoring overall employee impacts, the PUB recommends an increased focus on improving hiring, retention and mentoring for Black, Indigenous and People of Color (BIPOC). The PUB recommends that the bureaus look to their bureau equity and strategic plans and ensure there are components to adequately address the ongoing challenges of this work. The PWB has demonstrated some success with their apprenticeship program and mentoring to result in increased hire of BIPOC employees, particularly in positions traditionally favoring white males. Similarly, BES has success with internship programs but may still struggle to convert those opportunities into becoming employees. There may be an opportunity for the utility bureaus to partner and build on recent good work, continue to expand opportunities and create more equitable work cultures.

#### **Performance Measures and Project Delivery**

The PUB supports the BES and Water performance measures for the coming year and will continue to work with the bureaus as they further develop and refine measures. We support the change to calculate the rate increase impact by quintile household income instead of only median household income. This is a more accurate and fair way to assess economic impacts on lower income households. We suggest that the bureaus also develop measures to estimate how the benefits of Capital Improvement Projects are distributed among different communities.

Finally, we commend both bureaus for the strides they are making towards equitable project delivery and community impacts. The PUB shares BES' optimism about the new Project Management Office (PMO) and acknowledges that it seems to be positively influencing project delivery. The PUB agrees with the bureau's plan to use the PMO to lead an overhaul of the Capital Improvement Project prioritization process and develop associated equity measures. We recognize BES for progress made in developing a Community Benefits Agreement for the Secondary Treatment Expansion Project (STEP) and piloting the contracting program to expand utilization of minority-owned, women-owned and other disadvantaged businesses. We appreciate these efforts and look forward to future programs.

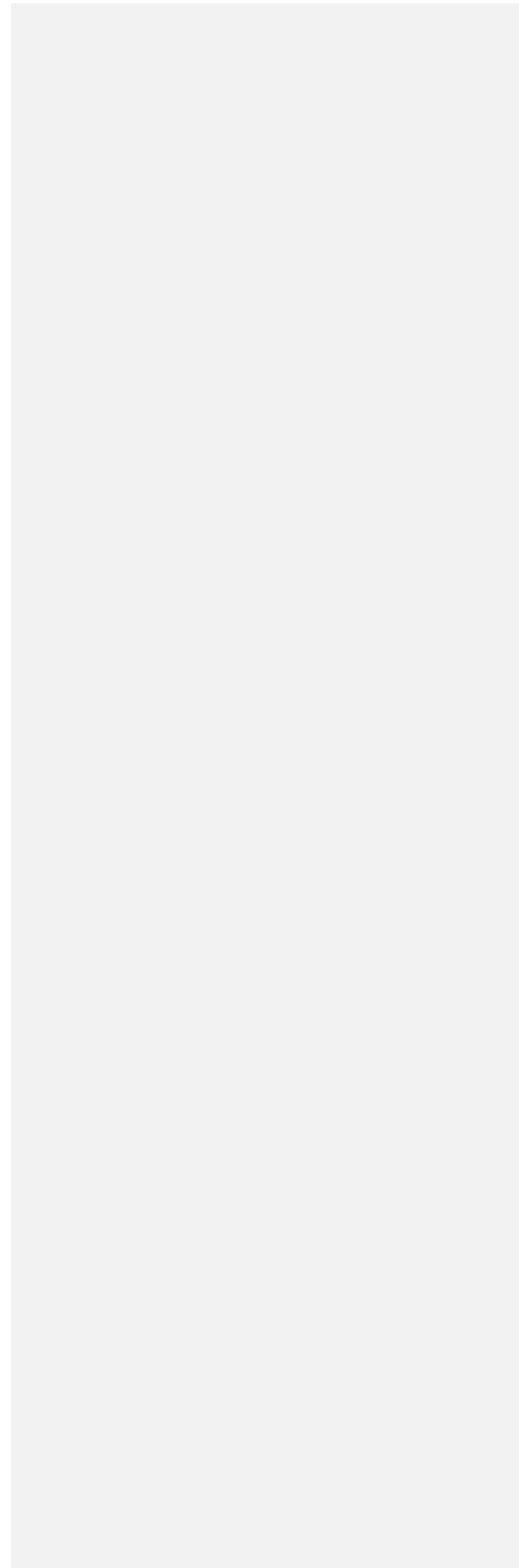
#### **Decision Package – PWB Capital Set-Aside Request - ADA Barrier Removal**

There was just one decision package to review with a request for approximately \$1.5 million in General Fund for removal of ADA barriers identified on PWB properties in the Citywide Transition plan. The PUB supports the intent of the package to ensure that hydroparks and other facilities are accessible to the public and reducing potential liability risks. However, we also recognize that this request must be prioritized among other City projects so encourage funding when appropriate compared to other competing demands. The PUB defers to the City Attorney and City Budget Office to determine which portions are appropriate for rate-payer funds versus General Fund.

**Commented [A7]:** REMOVE? Left out of talking points for work session per prior meeting. However, letters often do address decision packages so I pulled some language from last year and added in a bit about competing priorities since this seemed to be part of the discussion last meeting.

**Next Steps**

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. We look forward to continued conversations about the budget and utility services.



**NOT PART OF DRAFT LETTER – Included here for reference by PUB since draft includes link to last year’s letter regarding recommendations for Financial Assistance Program**

Particularly as rates continue to increase, the financial assistance programs are a critical component of the bureaus’ programs to support residents equitably. The PUB is supportive of expansions to the financial assistance program over the past year, and in addition have identified the following areas of recommendations to ensure these programs are increasingly effective and equitable (list order is not prioritized):

1. Accessibility – The website is difficult to navigate to locate information about the financial assistance programs, particularly the opportunities for multi-family residents. If PUB members struggle to find information, even as an insider with knowledge of what to look for online, then it causes great concern for the customer that urgently needs these resources but does not know they exist. PWB should use Google analytics and other tools to evaluate and implement changes to improve accessibility of the financial assistance programs for the public. At a minimum, the website should be updated to provide easier access to the public to the dedicated line for the financial assistance team, more graphic materials should be developed on how to access programs, and crisis information should be provided in multiple languages similar to other assistance resources online.
2. Marketing and Outreach – the financial assistance program has been established but has a gap in marketing and outreach to ensure all residents in need are aware of the resources and connected to appropriate opportunities. Although PWB has made some efforts in outreach to religious organizations they report that it has not been successful. The PUB recommends a more thorough evaluation of why these efforts have not worked and identify changes to improve the impact of efforts to religious organizations and immigrant and refugee partners. The PUB recommends that resources be dedicated to the marketing and outreach for a focused push to get the word out to the public. One example could be the hiring of summer interns to staff at community centers to connect with the public.
3. Leveraging Resources of Related Programs – Both BES and PWB have other programs that could assist residents that are at risk and struggling to afford their utility bills, specifically the PWB Water Efficiency and the BES Clean River Rewards programs. Although you cannot compel residents to participate in these voluntary programs, the PUB recommends strengthening the connection between the financial assistance program and these other programs so that residents are effectively advised of the opportunities for assistance on home repairs and other improvements that could reduce their utility bills. An Auditor report previously identified that the Clean River Rewards program has primarily benefited middle class homeowners and has not effectively reached low income customers. BES has recently conducted outreach to financial assistance program participants and had a positive response. The PUB supports this expanded outreach and recommends that the connections continue to be strengthened, as well as new partnerships explored such as with the renter’s assistance program in the Housing Bureau. With effective messaging and repeated announcements, the bureaus may be able to increase participation and help customers that are struggling to afford their utility bills.
4. Address Administrative Challenges – Although the financial assistance programs have been successful, the PUB is eager to support efforts to close the gap between those who are qualified to receive assistance and those who are receiving it. We have heard concerns about the capacity

for Home Forward and the STRA agencies with existing resources. The PUB recommends that PWB:

- a. inquire with Home Forward and STRA agencies about bottlenecks,
  - b. identify whether there are needs for additional administrative support,
  - c. identify whether internal resources or additional funding could address these challenges, and
  - d. conduct an annual review of the relationship with STRA agencies to identify opportunities to influence their processes and ease access for community members needing resources.
5. Data Tracking and Analysis – As the bureau works toward closing the gap on who is receiving resources, data will be very important to determine how to improve marketing and outreach. The PUB recommends strengthening the tracking of the demographics of who is being served and analyzing who is missing to inform program activities. The PUB also recommends tracking the collaboration partners and relationships so that these can be clearly communicated with the PUB and public and used to help identify gaps and recommendations for expansion.