

Analysis of FTE Requests in the FY 2018-19
Budget Submission of the
Portland Water Bureau

Melissa Merrell, PUB Analyst

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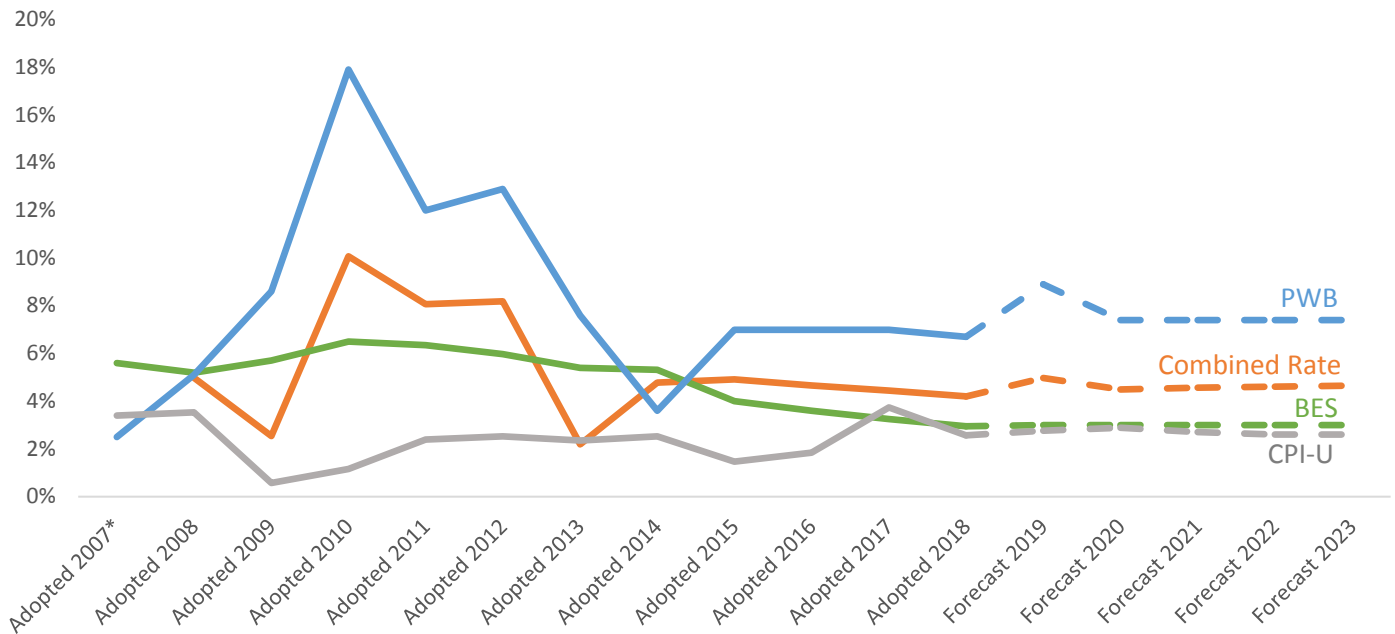
Request Overview

The Portland Water Bureau’s (PWB) FY 2018-19 budget request includes \$100.8 million for operating expenses, \$136.7 for capital projects, for the next year, and an additional 21 FTE. If City Council were to approve all the decision packages included in the request, the bureau’s operating costs would increase by almost \$3.5 million. \$1.3 million of the proposed operating increase is requested from the General Fund: \$1.1 million for preservation work at Mt. Tabor and \$225,200 for park maintenance activities. The decision packages would require a 1.3% increase in retail rates for the typical single-family household.

Rate Impact for the Typical Single-Family Household

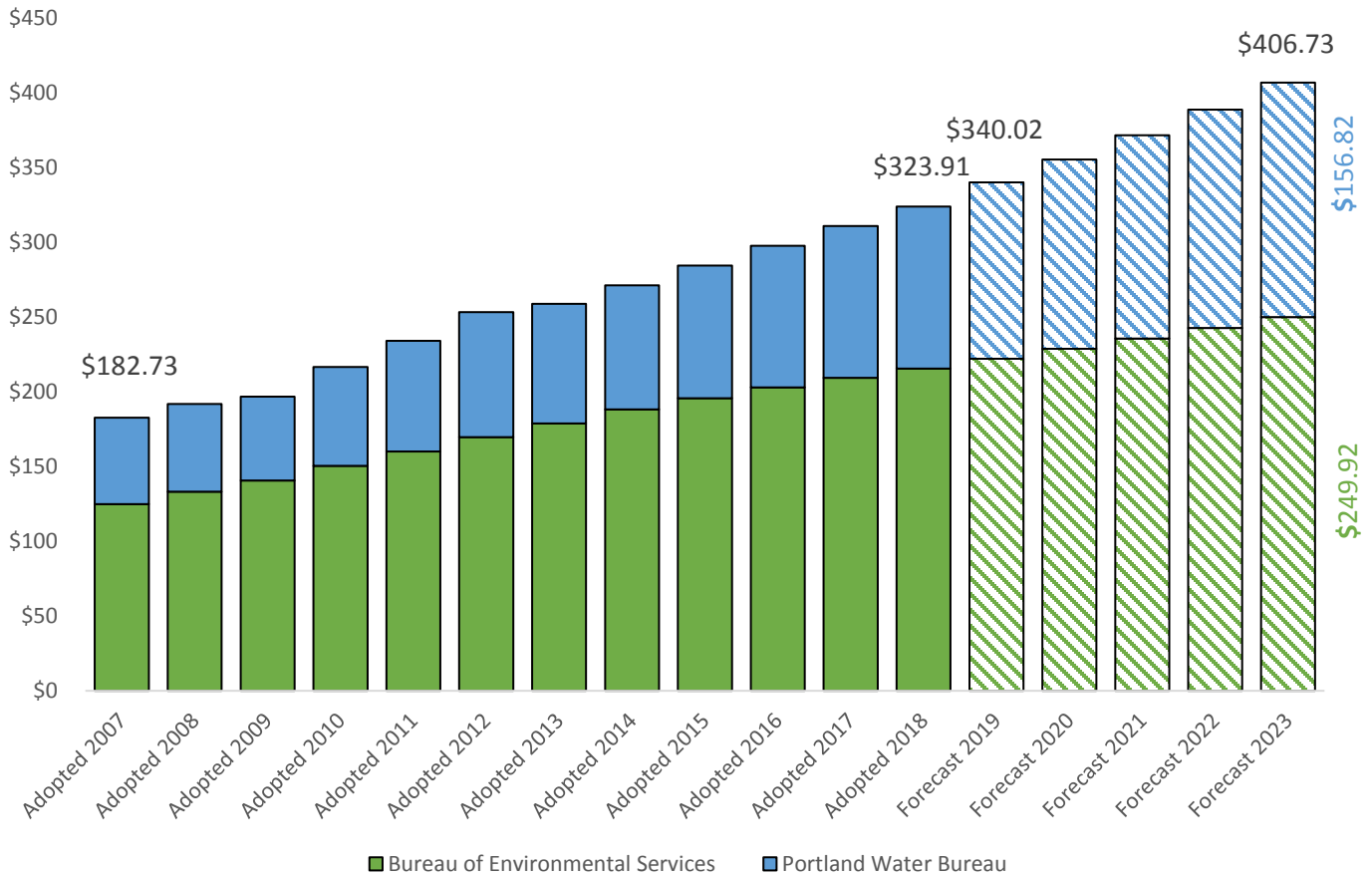
The total rate of increase for the typical single-family household to support the bureau’s requested budget would be 8.9%. Combined with the proposed rate of increase for the Bureau of Environmental Services, the combined monthly increase would be 4.97%.

Recent and forecasted rates are much *less volatile* than ten years ago but the combined rate of increase continues to be about *three times the rate of inflation*.



A small portion of customers (12%) have opted for monthly statements. Most customers received quarterly bills.

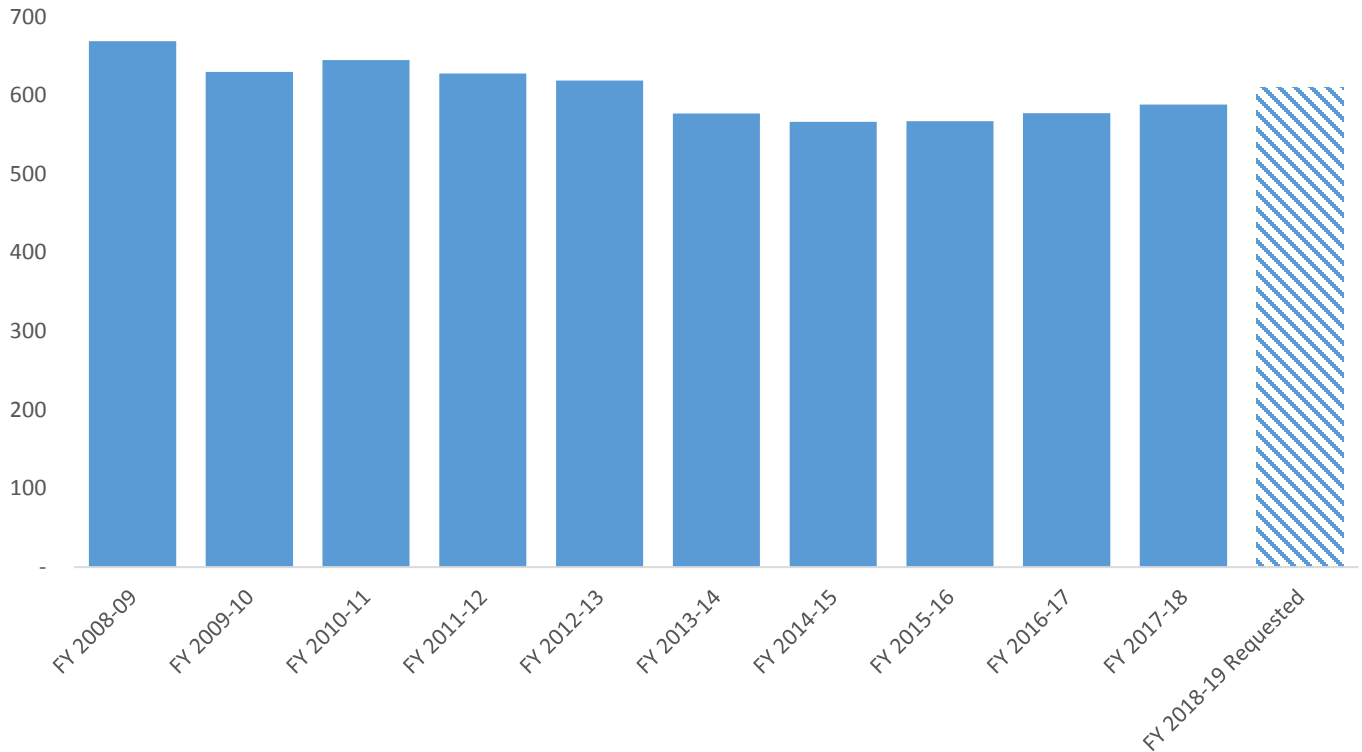
Compared to FY 2017-18, the quarterly typical single-family household bill for water, wastewater, and stormwater services *would increase almost 5%* to \$340 in FY 2018-19 and to \$407 over the next 5 years.



The monthly equivalent increases would be \$113.34 in FY 2018-19 and \$135.58 in FY 2023.

Historical FTE and Vacancies

Total FTE for PWB *decreased by 15%* between FY 2008-09 and FY 2013-14. Between FY 2014-15 and FY 2017-18, PWB added 22 staff. The FY 2018-19 request is 21 FTE, *a 4% increase from last year and almost as many as the last three years combined.*



Recent FTE Authorizations and Current Vacancies in PWB

Below is a presentation of the positions that were authorized by City Council in FY 2017-18 and the hiring status of each position. Also presented is snapshot information about the vacancies in the bureau as of early February. The PUB has requested hiring and vacancy data as a component of consideration related to realignment and potential reprioritization of existing resources to meet emerging needs.

PWB received authorization for 2 FTE during the FY 2017-18 annual budget process and 0 FTE during the Fall BMP. As of February 5, both of those positions have been hired.

Process	Position	Status
FY 2017-18 Annual Budget	Administrative Assistant	hired
	Management Analyst (records)	hired

Vacancy information for the bureau changes daily. According to data from the city-wide system on February 5, 2018 and verified with PWB, there were 47 regular position vacancies and 4 limited term vacancies. These vacancies include 9 positions that had been filled (but didn't yet show in the city-wide system) and 20 positions that had been vacant for fewer than 100 days. 21.25 positions have been vacant for more than 100 days:

- 1 FTE is in the **Administration Group**. The bureau is deciding how to change this position to better meet the communications needs of the bureau.
- 6 FTE are in the **Customer Services Group**, five of which are regular positions and one is a Limited Term position. Interviews have been held for one of the positions. The recruitment process has closed for the other five and the hiring managers are reviewing applications.
- 8 FTE are in the **Engineering Group**. 2 positions have temporary appointments. Offers for two positions were turned down due to salary; they are currently filled with retirees. Recruitment is underway for 3 other positions. Recruitment for one position is on hold until the manager position is filled.
- 1 FTE is in **Financial Services**. Recruitment is underway.
- 2 FTE are in **Maintenance and Construction**. One is being reclassified and one has a temporary appointment.
- 3 FTE are in **Operations**. Interviews have been held for one of the positions. The recruitment process has closed for one of the positions and the hiring manager is reviewing applications. The third position was reclassified and recruitment will begin soon.
- The final unfilled position is a 0.25 FTE **in Hydropower** that has been vacant for more than seven years.

Requested Positions by Group- to be added

Group	Current FTE and LT	Requested Positions	% Growth if Positions are Authorized	Current Vacancies > 100 days
Administration	38	1	2.63%	1
Customer Service	103	2	1.94%	6
Engineering	120	7	5.83%	8
Operations	118	9	7.63%	3
Resource Protection	28	2	7.14%	0

The summary and analysis that follows focuses on the FTE requested in the FY 2018-19 budget. It doesn't address other additions or changes to the bureau's budget. General information is provided about:

- Work that would be provided by the requested position,
- General goals of the program or group,
- Expected outcomes,
- Alternatives included in the budget request,
- Consequences of the position not being authorized by City Council, and
- Priority of the request as determined by the bureau.

In addition, there is a section for questions that PUB could consider as they weigh the requests and tradeoffs that PUB has raised in other budget discussions. This section is included to encourage discussion and other questions members may have and will likely evolve as PUB deliberates over the next month.

Recommendation Options

Below is a discussion of individual decision packages put forward by the bureau. The PUB has requested staff to summarize requests and to identify issues and connections to the values identified by the PUB listed below.

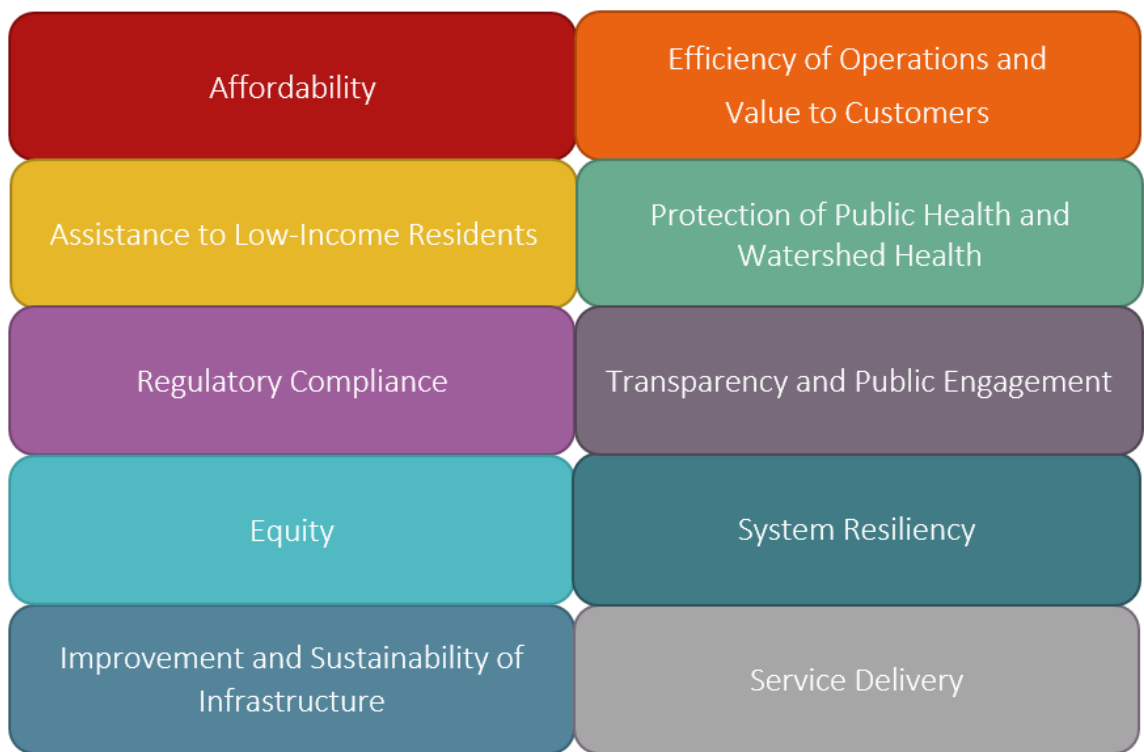
As the PUB considers these requests, its recommendations to City Council could take a number of forms. One structure to consider would be:

1. Recommend the FTE as requested.
2. Recommend the activity but suggest alternate staffing options for the request.
3. Make other program or policy recommendations for City Council to consider.
4. Do not recommend requested positions or activity.

PUB Values

In January 2018, PUB identified 10 values that it would consider as it evaluated the budget requests from PWB and BES. Each FTE section below includes a value component identifying the values most directly related to each request. The connection to individual values is subjective in nature and may differ by matters of degree. For example, as PWB is an asset heavy bureau and one who's primary mission is service delivery, one could make a case that almost all requests tie to those categories. The discussion below highlights those values most directly tied to the requests but others may be highlighted during the course of PUB deliberation.

PUB VALUES



WA_01 Water Treatment

Total Decision Package Costs: \$351,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 7

Priority of the Bureau: #1

Request Summary

The Water Bureau is requesting 7 FTE (1 Principal Engineer, 2 Engineering Associates, 1 Program Coordinator, 1 Management Analyst, and 2 Water Treatment Operators) for water treatment. The positions are primarily being requested to address the increased work resulting from City Council direction to build a filtration plant.

Considerations

Project Timeline, Staffing Needs, and Consequences of Not Receiving the Positions

Building the filtration plant will be a major capital undertaking for the bureau. The bureau has entered into a compliance agreement with Oregon Health Authority (OHA) to serve filtered water by September 30, 2027. Planning and design for the facility is expected to take five years and construction is estimated to take five years.

The bureau has used mostly internal staff resources this year to begin the preplanning and to secure consultant services to support the planning and design stages but requires additional staff for the remaining phases of the project. In FY 2018-19, the planning and land use will begin and last for two years. It is during this phase that the bureau anticipates needing program management and support that would be provided by the requested engineers, program coordinator, and management analyst positions. That need will continue through the design and construction phases. In FY 2019-20, a one-year pilot study will be done to test and inform the design of the facility. Results of that study need to be submitted to OHA by November 2020. Construction is planned to begin in FY 2022-23.

The 7 requested FTE can be considered in two categories with some overlap – those required for the planning, design, and construction and those required permanently to operate facilities.

5 FTE for Planning and Design of Filtration

Five of the requested positions - principal engineer, two engineering associates, program coordinator, and management analyst - will support the work of the bureau to get the facility

constructed. That need is for a discrete but not short time period, at least through the beginning of construction.

The principal engineer, engineering associates, and program coordinator would join existing staff and consultants to make up the project team. The management analyst would be part of the bureau's Contract Administration Branch to support the increase in procurement activity that will result from filtration. This increased work load has already begun as the bureau is using consultants for the planning phase; this increase is expected to last through construction.

If the positions are not approved, the bureau has said it would likely use contracts to complete the engineering and management work. The management of those contracts would require existing staff time.

Current Staffing and Vacancies

The Engineering Services Group has 120.5 FTE and several subgroups including Planning, Technical Services, Design, and Construction Management. The filtration team, as envisioned, would be similar to the existing Engineering Planning Teams that typically have a supervising engineer and two to three engineering associates.

Vacancy data for the bureau changes daily. At the beginning of February, there were 14 vacancies in the Engineering Service Group. None of vacancies were in the planning subgroup.

The Contracting Management Branch is also part of the Engineering Services Group with 4 FTE. One position in this group, a Senior Administrative Specialist has been vacant for more than 300 days but was recently reclassified, and the bureau will begin recruiting soon.

Questions

- The planning positions to support filtration will be needed for a discrete, but not short, period of time. Is a permanent increase in the size of the bureau to meet this need the most efficient staffing model? Could some of the positions be contracted services instead of FTE? Given the rate of attrition, how long would it take to ramp these positions back down at the end of the project through natural attrition?

2 FTE for Operators

The two operator positions are needed in the long-term to provide day-to-day operation and maintenance of the filtration facility once operational; in the medium term to provide day-to-day operation and maintenance of the corrosion control facility once operational in 2022; and

in the short-term to contribute to the planning and design process of both facilities and to address current needs.

The two requested positions would not necessarily be the ones working on the filtration or corrosion planning and design but would increase the pool of operators from which some time would be assigned to the new facility work. Because the operators are represented, the assignments are bid and would be decided based on experience.

Increased corrosion control treatment and the planned facility which needs to be operational by 2022 will include chemicals and technology new to the bureau and will require upfront operational training. The Portland water system also will be considered a higher classification of system that requires more advanced levels of operator staffing because of the combination of corrosion and filtration treatments. Finally, as the bureau shifts from its existing corrosion control protocol to the new protocol, there will be an overlap in the operation of the two systems, placing a higher demand on the operating staff.

If the operator positions aren't approved, PWB would request them again next year as the changes in corrosion and treatment will require a permanent increase in operators.

While unrelated to this specific FTE request for more operators, PWB is working to meet the separate regulatory schedules for corrosion control and filtration in the most cost-effective way. Those projects both add new treatment systems and infrastructure. Absent the regulatorily imposed deadline, the systems and infrastructure needed for corrosion control would be incorporated into the planning and design of the filtration plant. However, corrosion control changes must be operational by 2022 ahead of the 2027 deadline for filtration. The Operations and Engineering groups are working together to identify an interim solution to meet the compliance requirements for corrosion which need to be in place before the filtration facility will be operational.

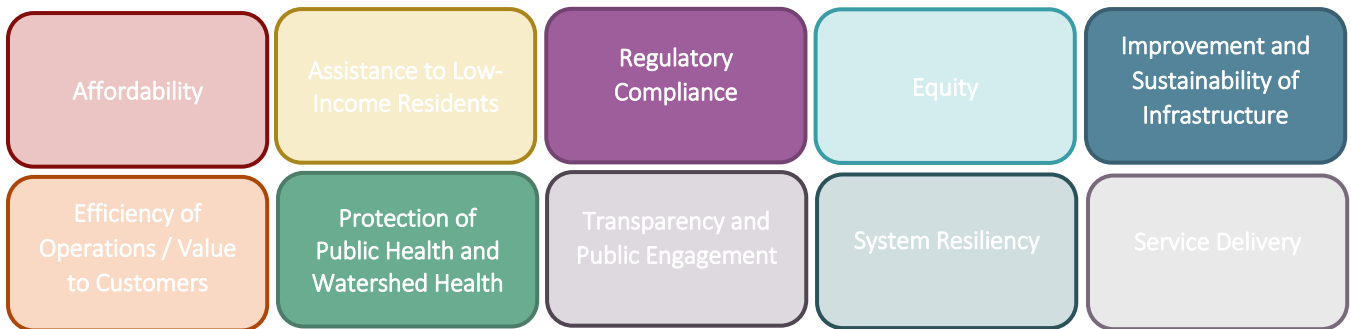
Current Staffing and Vacancies

PWB currently has 12 operator positions: Operations Supervisor, 1 Lead Water Treatment Operator II, 9 Treatment Operator II, and 1 Water Treatment Operator I. Three of the Water Treatment Operator II positions are currently vacant. Two of those are limited term positions which have been vacant for more than six months, though one will be filled by the end of February. The position became vacant mid-January and recruitment has not yet started.

Questions

- N/A

Related PUB Values



This request is related to 3 stated PUB values: Regulatory Compliance, Improvement and Sustainability of Infrastructure, and Protection of Public Health and Watershed Health. In addition, the increase in operators related to corrosion control could have an equity component. The bureau doesn't have data about whether communities of color are affected differently by water quality issues. However, changes in corrosion control will benefit homes built during 1970 and 1985. There is a greater concentration of those homes in East Portland but bench-testing showed there wasn't a concentration of high lead result in east Portland.

WA_02 Unidirectional Flushing

Total Decision Package Costs: \$444,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 5

Priority of the Bureau: #2

Request Summary

The Water Bureau is requesting five FTE (two Environmental Technician I and three Environmental Technician Class II) for its Unidirectional Flushing work. Generally, flushing is a method of moving water through the pipes to respond to water quality issues or as a part of regular maintenance to reduce biofilm and accumulated debris that could affect water quality.

Considerations

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB currently doesn't include strategic system-wide flushing as part of its maintenance plan and instead does spot flushing in reaction to known water quality issues. With the planned

increase and change in chemicals for corrosion control and the move to a filtered system, PWB would realize benefits from a systemic flush. For example, biofilms and debris can make corrosion control and disinfection chemicals less effective and require higher amounts of chemicals to achieve the desired effect. Cleaning the system could result in less treatment and cost savings for chemicals.

If the requested positions aren't approved, PWB will continue its current spot flushing work and potential chemical savings and other water quality improvements won't be realized.

Current Staffing and Program Timeline

Unidirectional Flushing programs typically have a manager, in-office support that helps coordinate work with planning and mapping, and flushing field teams comprised of two staff each. PWB currently has 1 FTE dedicated to a flushing team and pairs that FTE with one staff person from other areas as available. The flushing work is supported by one in-office Engineering Technician III and about 20 percent of a Water Quality Supervising Engineer's time.

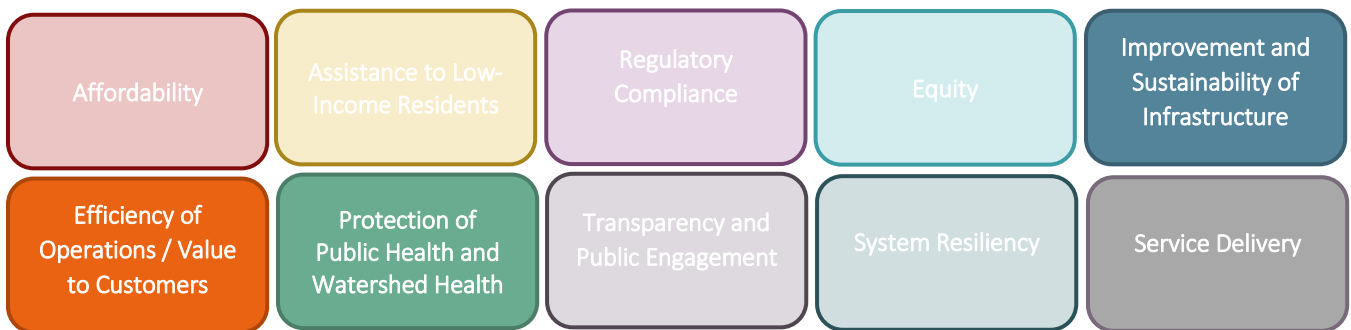
The staffing requirements to complete a system-wide flush prior to the implementation of the increased corrosion control treatment will require a large increase in staff work for about five years. The bureau estimates three two-person teams could flush the system in about 10 years, the outside range of industry standard. This estimate is based on its experience from many years ago and some information of nearby utilities. The bureau anticipates requesting more staff in future years to complete the system-wide flush in five years prior to the changes in corrosion control.

Questions

- What are the benefits of more phasing in the staffing changes? Approving three of the requested FTE would double the bureau's existing capacity. The bureau could use FY 2018-19 to update its estimate of how long a system-wide flush would take with multiple dedicated teams and assess whether increasing the field teams will require additional in-office support and coordination. In addition, the work would be limited by discharge requirements of BES and would need time to coordinate a major increase in flushing activity.
- The cost savings argument for the positions don't seem to be supported. First, it's uncertain if flushing would result in a need for less chemical treatment. Second, if the long-term staffing need for the system is three teams, the staff costs outweigh the potential savings from less chemicals. Fewer chemicals would likely be viewed as a positive outcome for most Portlanders, regardless of whether savings are realized.

- Does the unidirectional flushing expansion plan include a mechanism to capture and report water use for this activity which could complement the bureau’s water loss reporting and improve its estimates of water loss? The Water Loss Audit states the validity of the use of water in this way is likely well captured; however, these positions would dramatically increase this use and the bureau should ensure the current method of capture would still be reliable.
- Increased staffing to flush the system in five years would be required for a discrete, but not short, period of time. Is a permanent increase in the size of the bureau the most efficient staffing model? Once the bureau has a better estimate of its staffing needs, could the two teams be augmented with limited term positions to meet the goal of a full system flush prior to the implementation of corrosion control? The bureau could then reassess its long-term needs.

Related PUB Values



This request is related to 4 stated PUB values: Improvement and Sustainability of Infrastructure, Efficiency of Operations and Value to Customers, Protection of Public Health and Watershed Health, and Service Delivery.

WA_03 Workforce Management

Total Decision Package Costs: \$176,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 3

Priority of the Bureau: #3

Request Summary

PWB is requesting three FTE (2 Public Work Inspectors and 1 Safety Officer) to address workforce management needs. The FTE would be located in two different and unrelated groups within PWB and are presented separately below.

Considerations - 2 FTE for Public Works Inspectors

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB has a staff of public works inspectors and augments this staff with contracted inspectors when necessary. These inspectors work on capital projects of the bureau. The demand for inspectors fluctuates from year to year and is concentrated at peak times during any given year.

If the positions aren't approved, the bureau would continue to contract the services as needed.

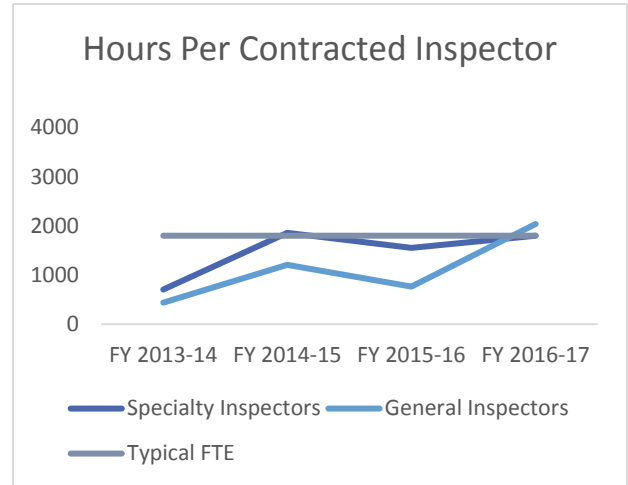
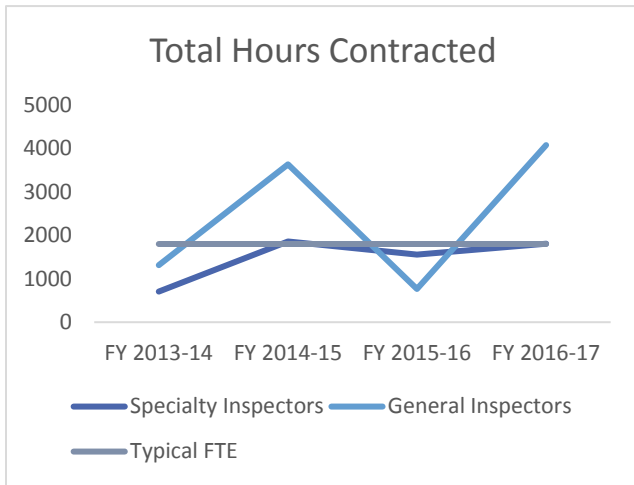
Current Staffing

Project Inspection is a sub group of Engineer Services with 1 Public Works Inspection Manager, 5 Senior Public Works Inspectors, and 2 Public Works Inspectors.

Vacancy data for the bureau changes daily. However, two inspector positions have been vacant for about two months and recruitment is underway.

PWB provided data on hours contracted from FY 2013-14 through FY 2017-18 for general inspectors and specialty inspectors. When considering total hours contracted compared to a typical FTE, assuming future consumption will be similar to past years, data from the past three years supports the additional of a specialty inspector. The total utilization of general inspectors is less consistent. In FY 2013-14 and FY 2015-16, PWB contracted fewer general inspector hours than a typical FTE. When taking into account that the bureau contracted multiple general inspectors concurrently during times of peak need, the hours contracted per general inspector was fewer than the typical FTE in all but the most recent year. The District

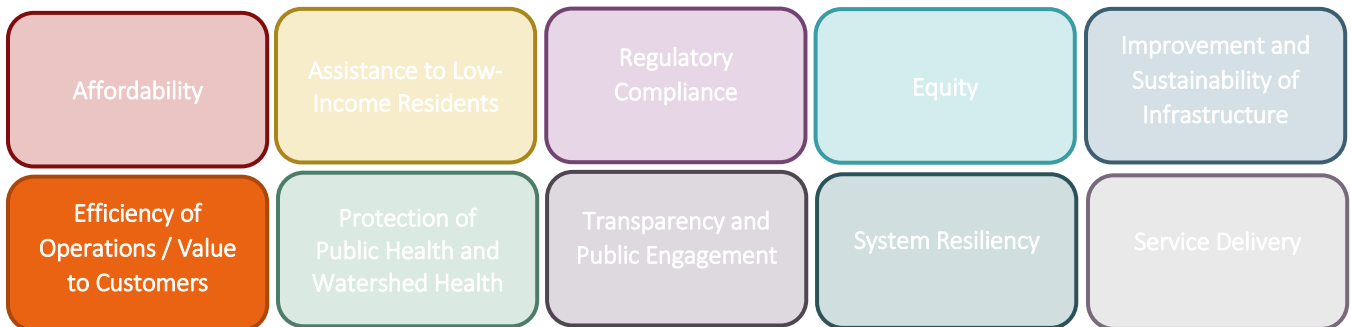
Council of Trade Union contract allows for contracted work that occurs during peak loads which the use data suggests.



Questions

- Assuming the use data is a good predictor of future need for inspectors, there appears to be a consistent utilization of contract services for specialty inspectors to support an FTE. The case for a general inspector is less clear. Can the inspections that now take place during peak times be rescheduled to even out demand through the year? What would work would an FTE do during the off-peak times in the year?
- The utilization of general inspectors appears much more volatile during the past five years. What evidence does PWB have to demonstrate an ongoing annual need for an FTE for this work?

Related PUB Values



This request could be considered related to 1 stated PUB value: Efficiency of Operations/Value to Customers to the extent PWB realizes efficiencies from managing fewer contracts for inspectors.

Considerations - 1 FTE for Safety Officer

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB is requesting a Safety and Risk Officer for the Operations Group.

There are three types of work proposed for this position:

- Updating safety plans such as the Risk Management Plan that is required by state regulations to be submitted every five years. The existing plan was last done by contracted services and is out of date.
- Assessing the trainings that should be provided and which staff have received the required training.
- Designing and implementing a training program to schedule and deliver required training and to track staff completion.

If the position isn't approved, the bureau would continue to contract services for the safety plans required every five years. The bureau could also use consultant services or a limited term position to do the initial needs assessment for worker training.

Current Staffing

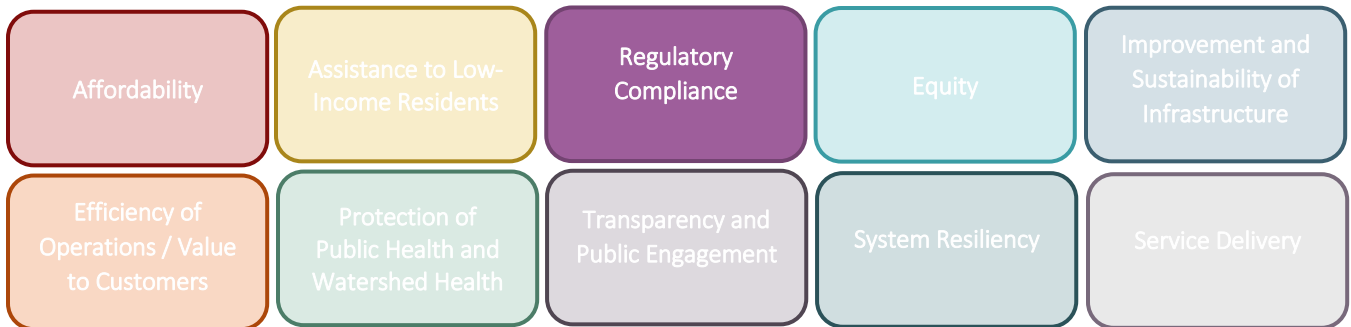
PWB currently has a five-person safety team located in the Maintenance and Construction Group. That office is focused on the risk and safety needs of roughly 150 FTE in that group and doesn't have the capacity to coordinate the safety needs of the 120 FTE in the Operations Group who have different training requirements by regulation and work in environments that pose different types of risks. The Operations Group currently has 120 FTE with three vacancies, two of which are in the hiring process.

Questions

- Oregon requires that the Risk Management Plan is updated every five years. PWB has used contracted staff for this in the past. Is contracted services the best way to deliver this work that is needed intermittently? What is the value to the customers of City staff producing the work?

- The training assessment and design of a training program appears to be work that would be delivered over a discrete period of time. Has PWB considered a limited-term position to begin this work and reassessing its long-term needs?
- The city is replacing its existing city-wide training platform that could be used to track ongoing staff training status, decreasing the need to build a specialized tracking system. Has that been considered as the bureau determined the FTE need?
- What is the bureau’s vision for a fully staffed safety group for the Operations group? If the Operations group is replicating a similar structure as the Maintenance and Construction group, is there an expectation that this request will be followed by additional FTE requests?

Related PUB Values



This request is related to 1 stated PUB value: Regulatory Compliance as the Risk Management Plan and worker trainings are required by state regulation.

WA_04 Asset Management

Total Decision Package Costs: \$281,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 2

Priority of the Bureau: #4

Request Summary

PWB is requesting two FTE (Program Coordinator and Management Analyst) The positions would be located in two different and unrelated groups within PWB and are presented separately below.

Considerations - 1 FTE for a Program Manager in the Operations Group

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB proposes hiring one FTE in the Operations Group to further efforts of tracking and using asset data for repair and replacement decisions. The Asset Management Branch within Engineering (5 FTE when fully staffed) has worked with the Maintenance and Construction Group and the Operations Group to institute changes in the way the bureau collects data for distribution assets, but the bureau hasn't yet made significant progress with supply and treatment assets.

While PWB plans to continue its data collection across existing and new capital assets, there is a need for a program manager to begin using the data for analysis to inform maintenance investments.

The expected outcome of this position is more efficient investments in maintenance activities that maximize the life and performance of capital assets. Better decisions could reduce future staffing needs and costs for repairing failing assets. In addition, the position would increase awareness and use of asset management techniques in field groups of the bureau who operate closer to the assets.

If the position isn't approved, the bureau would continue to collect asset data but would not make progress in improving its use of the data for decision-making. An opportunity to improve asset stewardship would be foregone.

Current Staffing

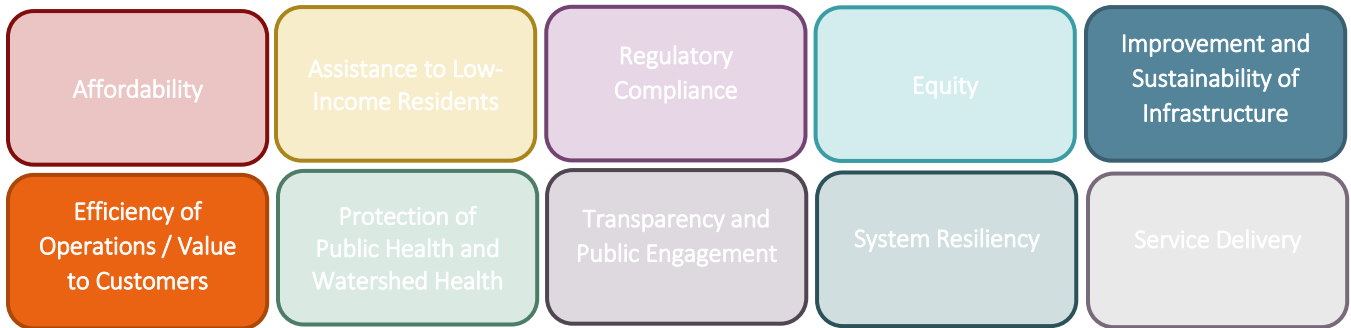
The Operations Group has 120 FTE, many of whom are operators and technicians that record asset data as routine operations and maintenance is done. While vacancy data changes daily,

in early February there were three vacancies in the group, two of which are in the hiring process.

Questions

- N/A

Related PUB Values



This position is related to two stated PUB values: Improvement and Sustainability of Infrastructure and Efficiency of Operations and Value to Customer.

Considerations - 1 FTE for a Program Manager to be located in the Resource Protection Group

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB proposes hiring one FTE, likely to be located in the Resource Protection Group, to develop and implement the bureau’s water loss control program. The state requires Water Management Conservation Plans and annual water audits as part of progress reports for those plans. In addition, because non-revenue water (those real and apparent losses) in the Portland system is estimated to be more than 10%, it is required to have a detection program. In 2016, PWB contracted a Water Audit and Strategic Loss Control Plan, which was updated in Fall 2017 to include data from FY 2015-16, the most recent available.

The updated annual audit estimated both real losses (those from leaks) and apparent losses (those from meter inaccuracies, unauthorized consumption, and billing inconsistencies). More than 85% of the estimated water loss come from leakage, which results in using more power, treatment, and faster depreciation of assets than necessary to meet customer consumption.

While the estimated cost of apparent loss increased slightly from FY 2014-15 to FY 2015-16, it is a small component of overall estimated water loss.

The estimated value attributed to both real and apparent loss was between \$2.7 million and \$2.8 million for FY 2014-15 and FY 2015-16. This amount represents about 1% to 2% of the total cost of operating the Portland water system.

Determining which component of loss is a higher priority should determine the approach to water loss. If it is the wasted resources due to treating and conveying more water than customers need (i.e., reducing real losses), the most effective investment would be in leak detection and prevention. The bureau currently has 2 FTE that identify leaks in the distribution system. Those personnel mostly react to reported leaks and the activity results in only small reductions to overall water loss. The water audit recommended investing in new equipment for those personnel and moving to a more systemic approach to identify leaks. If more personnel are required, they may be better located with this group. While apparent water loss makes up the bulk of the total estimate, necessary investments, primarily in metering, would result in more equitable billing of customers, it would not result in decreased operating costs or conservation of the systems water sources.

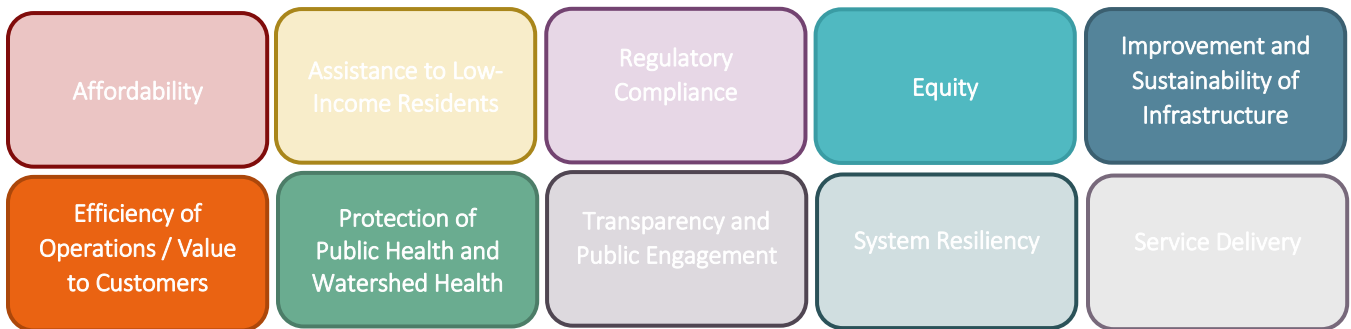
This position was requested last year and the CBO recommendation was that the bureau pursue some of the recommendations in the prior report that did not require coordination staff support such as conducting more small meter and wholesale meter testing and field validation of suspected data and billing issues, conducting more proactive leakage detection, and standardizing leak reporting.

If the position isn't approved, the bureau expects water loss to continue. Implementation of the recommendations is stated as a core business activity of the bureau yet the work remains unassigned. Additional staff for coordination is the lowest listed recommendation of the consultant's report.

Questions

- Which type of water loss is a higher priority for PWB?
- What investment, either staff or equipment, would provide the best value for PWB customers?
- What is preventing PWB from implementing the recommendation that don't require new staff?

Related PUB Values



This position is related to four stated PUB values: Improvement and Sustainability of Infrastructure and Efficiency of Operations and Value to Customer, Protection of Public Health and Watershed Health and Equity in terms of accurate billing of customers.

WA_05 Communications

Total Decision Package Costs: \$142,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 1

Priority of the Bureau: #5

Request Summary

The Water Bureau is requesting one FTE (Management Analyst) to be a technical writer for the bureau.

Considerations

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB proposes hiring a technical writer to help design, draft, edit and finalize significant documents produced by the bureau. While the bureau in the past had a dedicated technical writer, it realigned those resources in recent years to higher priority needs within asset management and the bureau's strategic business plan. The bureau is currently using other existing staff and contracted services on a project by project basis as available and required to meet its needs.

In requesting this position, the bureau is requesting a dedicated technical writer to address some of the continuity, quality control, and coordination that it lost in reassigning the prior

technical writer capacity. The bureau states that hiring the position could result in a decrease of \$30,000 currently spent on contracted technical writing services.

If the positions aren't approved, the bureau would continue to use existing staff, contract services by project, or set up a bureau-wide contract for services.

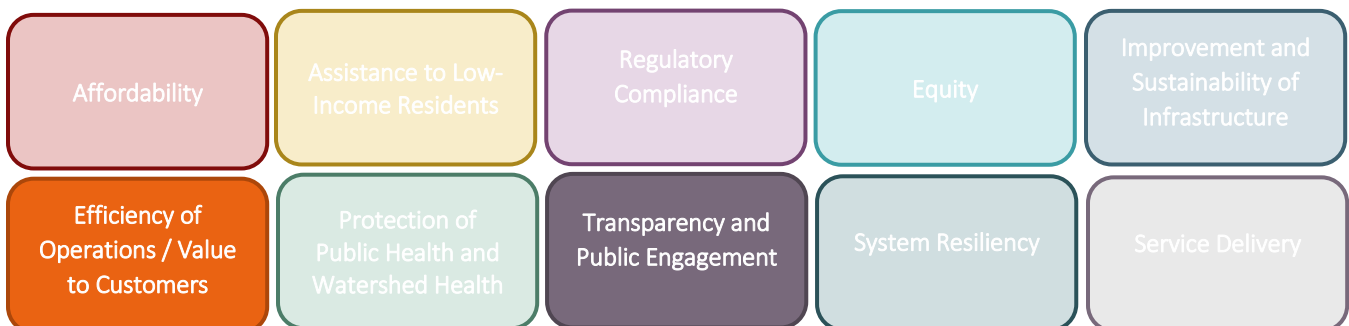
Current Staffing and Vacancies

This position would be located in the Resource Protection Group but is expected to provided services bureau-wide. The Resource Protection Group has 28 FTE and as of early February there were no vacancies.

Questions

- How do other bureaus get this work done?
- Is there enough dedicated time for a full time FTE? The decision package states that maybe \$30,000 in PTE services would be saved. What benefit would PWB gain if the work currently done by staff in the program areas were consolidated?
- The write up says one of the reasons this position would be requested is the Water Management Conservation Plan which is due in 2020. How did the bureau last do the update and is this a different approach? If the plan isn't due until 2020, could the position wait?
- Could the Strategic Business Plan potentially change how PWB does some of this work and if so, would it be better to wait until that plan and the Strategic Communications Plan are finished?
- Why would this position be in Resource Protection and not the Communications Group?

Related PUB Values



This request is related to 1 stated PUB value: Transparency and Public Engagement to the extent it would result in more consistent public documents.

WA_06 Equity Manager

Total Costs: \$144,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 1

Priority of the Bureau: #6

Request Summary

The Water Bureau is requesting one FTE (Senior Management Analyst) to coordinate the implementation of its Racial Equity Plan.

Considerations

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB requests to hire an Equity Manager.

PWB listed this low as a priority because it is making progress on implementing its Racial Equity Plan. If the position isn't approved, the bureau would continue to use existing staff for this work. The work would proceed more slowly without the position and the bureau would request it again next year.

Current Staffing and Progress on Meeting Equity Goals

PWB currently has four staff, an administrative manager, the training and development officer, and two outreach and information representatives, that do work related to equity, plus a committee of Water Bureau staff that comprise the Bureau Equity Committee.

The Bureau of Equity and Human Rights has 11 FTE. Dedicated staff to equity work within bureaus varies across city bureaus. There isn't an official list of equity staff and bureaus count these positions differently. Information compiled by the City Budget Office suggests there are about 14 positions within bureaus. Most of these are located in the Bureau of Development Services, the Portland Police Bureau, and the Portland Parks Bureau. BES received

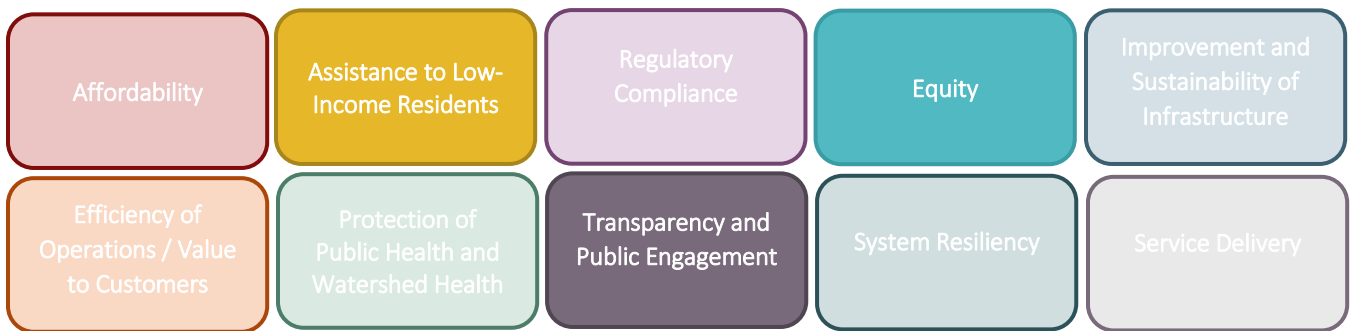
authorization for a Principal Management Analyst to be their Equity Manager in FY 2017-18 and that position was filled near the end of the year.

The PWB Racial Equity Plan was finalized in the Fall of 2016 and laid out goals and strategies for the next 5 years. At the end of the first year, the bureau made substantial progress in all areas of its Year 1 goals and has plans in place to achieve stated Year 2 goals.

Questions

- Are there any efficiencies to be gained by creating a utility equity team that could look at PWB and BES holistically for both internal and external equity considerations?
- How are the positions being created within bureaus generally advancing the City’s equity goals?
- How much more progress will PWB make in its equity plan with this position compared to its current approach? What is the concrete benefit or value that will be realized?

Related PUB Values



This request is related to 2 stated PUB values: Equity and Transparency and Public Engagement. In addition, some of the work that has been done in Year 1 of the Racial Equity Plan also related to Assistance to Low Income Residents.

WA_07 Financial Assistance Expansion

Total Costs: \$582,000 Operating Costs and \$0 Capital Costs

Total FTE Requested: 2

Priority of the Bureau: Unranked

Request Summary

The Water Bureau is requesting two FTE (Program Specialists) as part of a larger package of changes to assistance programs. These two FTE would be managed by the Low-Income Program Manager, an existing position currently without other staff, that resides in the Customer Service Group. These three positions would create a Low-Income Services Team to consolidate low-income services within the bureau.

Considerations

Program Goals, Expected Outcomes, and Consequences of Not Receiving the Positions

PWB proposes hiring two individuals who have experience working with low-income customers. They would manage data collection, provide analysis, submit policy recommendations, provide tailored customer service, and host biannual workshops and training for service providers and community groups.

In requesting these positions, the bureau hopes that the consolidation of services would result in more closely matching the needs of low-income customers with the service provided.

If the positions aren't approved, the bureau would continue operating the program as they currently do with these customers responded to by the entire customer service team and expected efficiencies would not be realized.

Current Staffing and Vacancies

The Low-Income Program currently has 1 FTE Program Manager who just retired. Recruitment for the Program Manager closed in early February and the bureau is currently reviewing applications.

Vacancy data for the bureau changes daily. However, as of early February, there were several customer service positions currently vacant but in some stage of recruitment. The Customer Services Group has several subgroups – three groups related to this activity are the Service Center, the Low-Income Program, and the Call Center.

- The Service Center has 1 supervisor, 2 Account Specialists II, 6 Account Specialists I. All of these positions were currently filled.
- The Call Center has 1 supervisor, 4 Account Specialists II, 22 Account Specialists I, 2 Account Specialists I who are limited term which expire 6.30.18, and 2 Part Time Account Specialists I. Early February, vacancies include:
 - 6 Account Specialist I were vacant -
 - 2 have been vacant for about 2 months;
 - 1 has been vacant for about 3 months;
 - 2 have been vacant for about 4 months;
 - 1 has been vacant for about 8 months.

Recruitment for all 6 ended January 29; the bureau is reviewing applications.

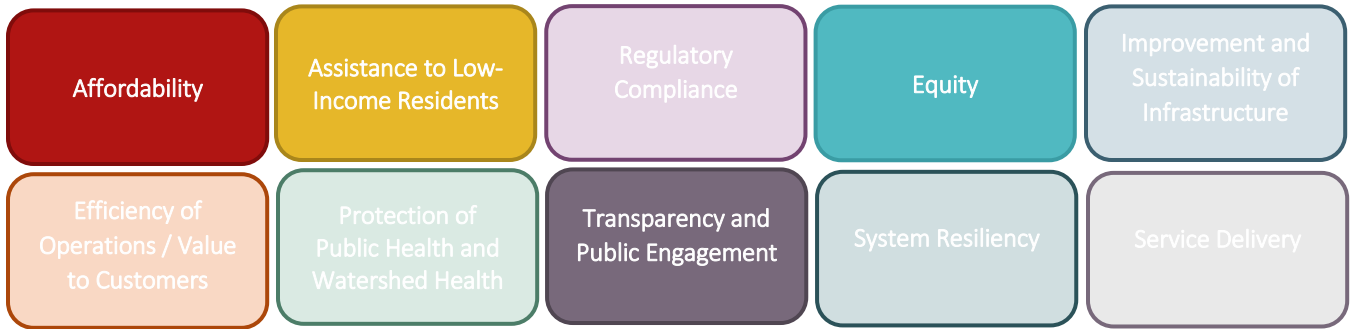
- 1 Account Specialist II has been vacant for more than 3 months. Interviews have been held and the bureau expects a selection soon.
- 2 Part Time Account Specialists I are vacant.

Questions

- These changes to the staffing structure for customer service for low- income customers are aspirational. What is the cost of adding FTEs to the bureau to try these? What is the capacity for a newly hired manager to direct 2 new staff in newly developed roles and unrefined work plans?
- The stated activities of the Program Specialists would require a broad and varied skill set to both provide tailored customer service and to do data collection and analytical work. Is it a realistic expectation of the role to deliver both types of work?
- The bureau could choose to realign for this work. That realignment could impact some existing service levels. For example, if the bureau used one of the existing or the next open customer service representative or call center account specialist, that could negatively impact customer service performance metrics. Is the trade-off of possibly longer hold times if using a call center person to better target low income services a reasonable trade-off?
- What are the benefits of phasing in the staffing changes? Adding one position to the groups in FY 2018-19, whether a new FTE or realigned FTE, would provide time for the

new program manager to be hired, learn the position, and develop the workplan for the Program Specialists.

Related PUB Values



This request is related to 4 stated PUB values: Affordability, Assistance to Low-Income Residents, Equity, and Transparency and Public Engagement.