

PORTLAND WATER BUREAU

STRATEGIC BUSINESS PLAN

PROJECT UPDATE
April 12, 2018



Purpose Today

- Summarize the three project phases
- Share a progress update
- Look ahead to the next phase and major steps

Project Road Map

Task A. Organizational Scan

ORGANIZATIONAL REVIEW

- Review previous and current plans and results
- Analyze gaps

VISION, MISSION, VALUES

- Collaborate with MT
- Identify where we want to be in five years

EQUITY LENS SERVICE AND WORKFORCE

- Identify opportunities
- Quantify risks and benefits

STAKEHOLDER ENGAGEMENT

- Gather data through surveys, focus groups, and interviews
- Internal and external

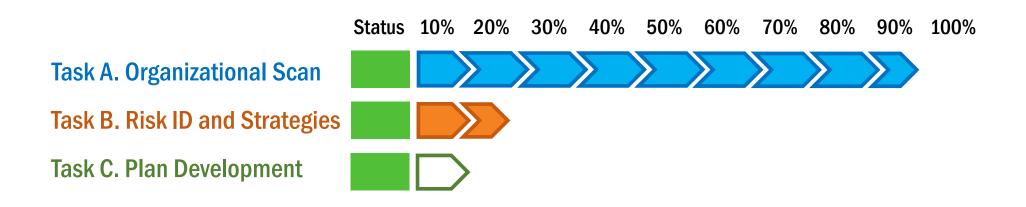
Task B. Risk Assessment and Strategy Development

Task C. Strategic Business Plan Development



Project Progress

- Finishing up the Organizational Scan
- Organizational Scan Report will be out in late April
- Started work on Risk Identification and Strategies



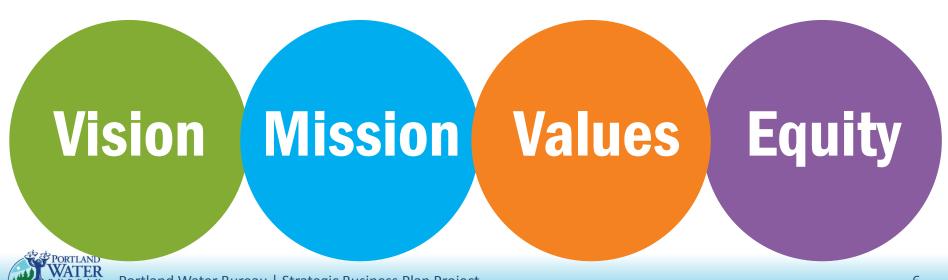
Organizational Scan Report

Broad assessment of the Water Bureau

- Employee focus groups—43 employees participated
- City bureau director interviews—12 City bureau directors
- Survey of external organizations—46 participants (out of 80 invited)
- External stakeholder interviews—5 organizations with extensive contact
- A review of 40 Water Bureau plans, reports, projects, and budgets
- History of the Water Bureau since the last strategic plan was published

Guiding Statements

- Drafted by a team of senior employees.
- Includes a bureau statement on equity.
- Will guide work in the next two phases.
- Statements are drafts until after the risk phase to allow for adaptation.



Equity Lens

- Will guide work in the next two phases.
- We are developing the method for best representing equity in risk scoring and strategy development.
- Integral to the way we are developing the plan.

The Risk Phase—A Closer Look



LEARN



- What is an organizational risk?
- How do we find true causes?
- How do we talk about risk?

BRAINSTORM

- What are the risks?
- Are these the true causes?



GET FEEDBACK & PRACTICE

- What do employees and stakeholders think?
- Practice using a scoring "cheat sheet" and form.



CATEGORIZE

- Where do these risks fit?
- Which risks belong together?
- What are emerging trends?

SEPTEMBER

SCORE & STRATEGIZE

- How likely is the risk?
- What are the impacts?
- How will we address our top risks?
- Have we applied the equity lens?



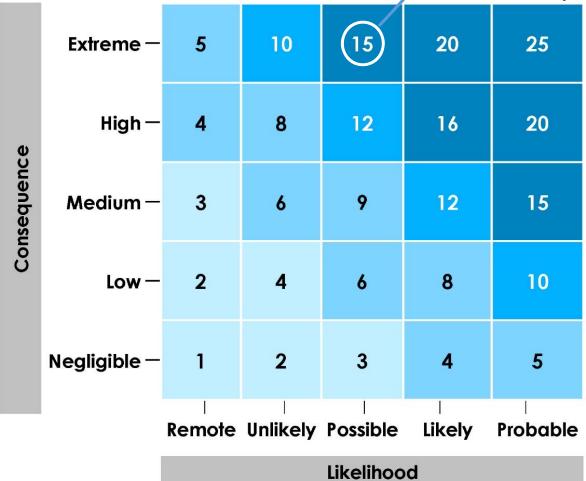
CHECK

- Are we missing any strategies?
- Is there alignment?



Sample Risk Map

Example risk: Increased retirement rate creates capacity gap



Strategic Business Risk

- A strategic business risk is the threat that an event action or inaction—will adversely affect an organization's ability to achieve its business objectives and execute its strategies successfully.
- Management of these risks has the twofold advantage of avoiding and minimizing the risk itself, and enabling informed business decision-making based on an understanding of where the business vulnerabilities lie.

Examples of Organizational Risks From Another Utility

- Increasing regulatory requirements
- New technology and data analytics needed to make increasing complex decisions
- Water conservation impacts ability to fund programs
- Lack of a succession plan with increasing retirements
- Difficulty recruiting and retaining staff as local costs of living rise
- Aging infrastructure needs exceeds ability to fund rehab/replacement

PUB's Role

- Review progress through quarterly updates
- Brainstorm risks
- Provide feedback on
 - Master list of risks
 - Major strategies
 - Draft plan

Project Timeline

August to September 2017

Strategic Business Plan Starts

We're figuring out the work involved in developing the Strategic Business Plan, finding consultants to help, and sharing the process throughout the Water Bureau.

April 2018 to October 2018

Assess Risks and Strategize

What are we doing well? What can we be doing even better? During this phase, we're identifying risks and strategizing how to work smarter and more equitably.



FY 2017-18

FY 2018-19

October 2017 to April 2018

Listen and Learn

Who are we? And where are we going? We're talking to staff and stakeholders, hosting focus groups, and revisiting the bureau's guiding statements. A Strategic Business Plan subteam is working to update the bureau's outdated mission, vision, and values statements.

October 2018 to Summer 2019

Develop Strategic Plan

It's show time! The final plan will include what we learned from bureau employees, strategies for how we can do our best work, and a road map to turning these strategies into actions.

- ★ = Employee feedback and participation
- = Stakeholder feedback and participation



Next Major Steps

- Brainstorms Risks
 - PWB—Early May
 - PUB—June 5
- PUB Provides Feedback on Risks—July 2018
- PWB Employees Give Feedback—Summer Survey
- PWB Scores Risks and Develops Strategies–Fall
- PUB Provides Feedback on Strategies—Spring 2019

Questions

