

Summary of Draft Recommendations (to be discussed/considered by PUB on March 3, 2020)

1. Financial Assistance Program – The PUB remains concerned about the affordability of water and sewer rates. Particularly as rates continue to increase, the financial assistance programs are a critical component to support residents equitably. The PUB is supportive of expansions to the program over the past year impacting both water and sewer rate assistance, and in addition have identified the following areas of recommendations to ensure these programs are effective and equitable (list order is not prioritized):
 - a. 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.
 - b. 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.
 - c. 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.
 - d. 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:

- i. inquire with Home Forward and STRA agencies about bottlenecks,
 - ii. identify whether there are needs for additional administrative support,
 - iii. identify whether internal resources or additional funding could address these challenges, and
 - iv. 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.
 - e. 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.
2. Employee Investment/Development - The PUB has identified the PWB Employee Investment and the BES Employee Development program offers as priorities for our review and consideration. The bureaus may be at different phases in their work, but both have the need for developing, retaining and attracting highly skilled, diverse and knowledgeable employees. These programs both capture critical investments in employees that advance the bureaus' equity and strategic plans, as well as increase focus on influencing an inclusive employee culture. The PUB is supportive of the staffing required to have a more coordinated focus on this work, including the addition of a training coordinator at BES and the addition of apprentice and entry level positions that PWB uses to further promote diversity in the workplace. The PUB will continue to monitor performance metrics and evaluate the programs' success in achieving stated goals to ensure that these are worthwhile investments. (KYS)
3. Secondary Treatment Expansion Program (STEP) – The major CIP STEP investments at the Columbia Boulevard Wastewater Treatment Plant (CBWTP) include a 10% savings goal reduction achieved through value engineering. The PUB is concerned that failure to meet that goal could result in increased rates and impacts to other planned work and is interested in monitoring progress to mitigate any rate impact. The PUB requests that the PMO provide regular updates on the STEP program on how the 10% value engineering goal is being achieved and accounts for any impact on CIP projects. (Ana)
4. CUB Letter - Support for concepts captured in the CUB letters (Note –staff has summarized the general concepts in the original letter below, but one challenge is that you only have the original letter, CUB will provide a more detailed letter later just like PUB) (Heidi)
 - a. PWB
 - i. Meeting Mayor's guidance – detail of 25% absorption plan, prioritize cost containment.
 - ii. Financial Assistance – bolster programs, particularly for low income renters; revisit using Utility License Fee for increased filtration costs to offset rates.
 - iii. Staffing increase by 19.5 FTE (to be evaluated)
 - iv. Support for equity advances
 - b. BES

- i. Meeting Mayor’s guidance – caution regarding not repeating additional use of rate stabilization fund for short-term savings in current year rate increase but longer-term rate impact in subsequent years
 - ii. Secondary Treatment Expansion Program (STEP) – recommend greater attention to planning, clear delineation between investments that are directly related to meeting regulatory mandates and investments for other CBWTP projects, regular updates on STEP costs, identification of projects that may be needed but could be delayed if STEP is not meeting the 10% savings goal.
 - iii. Transition Team and Reorganization – Support for efforts and creation of PMO, continue to ask about “right sizing” BES.
 - iv. Support for equity advances.
- 5. Asset Management. PUB recommends strengthening the asset management framework and integrating it into decision making on CIP investment. PUB recognizes that this may require investment in resources needed to refine the metrics. However, such an investment would increase transparency and enhance accountability as it would allow PUB and community members to understand the basis for future decision making and process refinements/improvements. – (Mia/KYS)
- 6. BES transition/restructure – PUB is interested and excited in learning about efficiencies that could be achieved and budget impacts resulting from the BES transition and reorganization. (Mia/Ana)
- 7. PWB Decision package – there is one discreet decision package requesting General Fund Dollars. Look at pages 114-115 of the [PWB Requested Budget pdf](#). These relate to the park-like amenities at PWB hydroparks so cannot be funded by rate dollars. PUB requested more details on other similar General Fund requests. Portland Parks & Recreation has a substantial list of ADA transition plan repairs required that will take many years to complete. The original plan is [available online](#) (note that funding not provided as originally planned so the dates of planned work have likely changed since 2015). Starting last year, PP&R is receiving \$1M in General Fund annually to begin these repairs and they are being initiated based on their priority order. According to PP&R staff, they use the following method to prioritize their repairs needed:

PP&R Barrier Identification Process Implementation:

- Survey the sites and identify barriers based on federal guidance.
- Assign Tier, Category and Experience scores (1=highest priority):
 - Tier score considered # of visitors, facility uniqueness, # of complaints.
 - Category score based on federal guidelines with 1 = travel path access, 2 = program access, 3 = amenities, 4 = barrier not required to meet ADA, 5 = historic facilities.
 - Experience score based on PDX resident experience priorities.
- Create a map of 17,008 barriers identified to address.

The PWB/hydroparks were not prioritized along with the other PP&R ADA barriers since they are owned and funded by different bureaus. (Amy)

- 8. Mayor’s Budget Guidance - There was discussion about whether the PUB may want to take a position regarding the Mayor’s guidance, specifically around the PWB direction to absorb 25% of the rate impact resulting from increased filtration plant costs. No specific proposals of support or concern have been provided yet - staff is adding this as a placeholder for PUB to consider whether to take a position. (Amy)