



Clean Water Services FY 2024 - 2026

Department & Program Roadmaps

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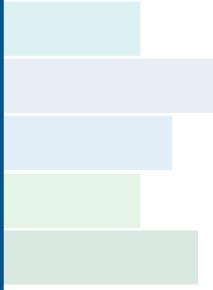
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Office of the CEO Department



FY24-26



Emergency Management

Emergency Management at Clean Water Services is an all-organization, all-hazard, collaborative initiative to respond to emergencies and disasters facing CWS. We focus on proactive planning and development of the Emergency Operations Plan, the readiness of our staff to respond to all hazards facing the organization, the resilience of our infrastructure to protect the public's health, and maintaining the relationships with our response partners to support the various community lifelines that are critical for disaster recovery.

Goal

- Maintain and repair systems, prevent contamination and transmission of disease after an event that disrupts operations and maintenance of CWS infrastructure.

Advantage

- Experience in building strategic programs at CWS.
- 15 years of emergency management experience in the Portland Metro area brings existing relationships with response partners and their emergency management representatives.
- Almost four decades of public sector experience. The knowledge that comes with this history is an undeniable advantage to CWS.

Scope

- Power loss, infrastructure failure, employee preparedness and infrastructure resilience, catastrophic events, reduce disease transmission, community lifeline, relationships with co-implementers, CWS infrastructure, and workforce

Value - Added

- Break down silos and advance collaboration toward a best day
- Minimize risk, protect assets, and ensure safety
- Enhance resilience
- Maintain public trust

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

CIP: Capital Improvement Program

EMC: Emergency Management Cooperative

EOP: Emergency Operations Plan

FEMA: Federal Emergency Management Agency

IGA: Intergovernmental Agreement

NHMP: Natural Hazard Mitigation Plan

ORWARN: Oregon Water/Wastewater Agency Response Network

CPAWC: Cooperative Public Agencies of Washington County

ORCAA: Oregon Resource Coordination Assistance Agreement



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
PROVIDE RESOURCES & SUPPORT TO INDIVIDUAL WORKERS TO BOOST THEIR FAMILY & PERSONAL PREPAREDNESS			
Develop Prepared Workforce		Launch an all-organization online orientation to the CWS Emergency Management program	
		2 weeks ready campaign	
INVEST IN CWS WORKFORCE'S KNOWLEDGE, SKILLS & ABILITIES TO EFFECTIVELY MANAGE AN INCIDENT RESPONSE INTERNALLY & IN PARTNERSHIP WITH OTHER PUBLIC ORGANIZATIONS			
Train Incident Management Team		Identify staff to serve on an incident management team	
			Train staff identified as incident management team on incident command system & emergency operations plan
		Determine how to use existing CWS technologies to support information management & exchange during incidents	
Coordinate Communication Methods		Support radio drills	
		Use Regroup to manage emergency notifications of the CWS workforce	
Support Regional Disaster Planning		Emergency Manager attends public works work group	
Strengthen County-wide Partnerships		Emergency Manager attends Washington County EMC meetings	
		CWS engages in active outreach to understand sanitation needs of 9 FEMA-designated community lifelines to prioritize recovery planning for community	
Support Mutual Aid Agreements		Manage ORWARN agreement, CPAWC IGA & ORCAA	
ENSURE CWS HAS DATA & INFORMATION TO MAKE SCIENCE-BASED DECISIONS ABOUT HOW TO MANAGE OUR CRITICAL INFRASTRUCTURES RESILIENCY TO DISASTER CONDITIONS			
Support Collaborative Mitigation Planning		Update project list of NHMP (edition 2022)	
		Complete NHMP annex process with Washington County's multijurisdictional plan	
Establish, review & renew risk resiliency assessment		Assess & prioritize hazards, inform investment approach for related projects	

Objective	Initiatives		
	FY 24	FY 25	FY 26
INVESTMENT IN STRATEGIES TO REDUCE LOSSES TO CWS ASSETS VIA DESIGN STANDARDS, CIP PROJECTS, GRANT-FUNDING PROJECTS & OTHER MITIGATION EFFORTS			
Convene & manage mitigation work group		Establish a mitigation work group to understand natural, technological & person-made hazards & prioritize projects to pursue grant funding or CIP inclusion	
Inform mitigation strategy		Conduct a Recovery Planning workshop with staff to determine realistic recovery targets (time & facilities) to guide mitigation gaps as well as refine recovery timelines & planning assumptions for CWS	
ESTABLISH AN EOP THAT REFLECTS THE MISSION, VISION, & VALUES TO CWS WHILE PROVIDING GUIDANCE TO RESPONDERS ON MANAGEMENT SYSTEMS & RESOURCES REQUIRED TO FULFILL OUR PERMITS REQUIREMENTS UNDER DISASTER CONDITIONS			
Manage & maintain EOP		Convene ad-hoc collaboration & conversations to determine content EOP's base plan & related annexes	

Table 1: Service Level and Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Develop Prepared Workforce	Performance measure	% of workforce that agrees they would be able to return to work within a week of a catastrophic disaster	85%		15%	30%
	Service level	# of Ready campaign activities	12			12
Convene & manage mitigation work group	Service level	# of mitigation work group meetings	4			4
Manage & maintain EOP	Service level	# of EOP annexes drafted	17			3
	Service level	# of chapters updated in EOP base plan	7			7

Program Roadmap

Organizational Excellence

Catalyzing Transformational Partnerships



FY24-26

Government Affairs



Government Affairs develops and manages the strategic direction of CWS' state and federal government relations and legislative affairs to consistently and effectively build awareness, support, and credibility with key opinion leaders; state and federal agency staff; legislative staff; and elected officials. Program activities include developing legislative priorities, advocacy in Salem and Washington D.C., enterprise-wide coordination on policy development, and broad coalition building.

Goal

- Effective and persuasive advocacy that advances CWS' policy goals and elevates brand credibility and reputation.

Advantage

- Decades of experience in Salem and working with Oregon's congressional delegation. The relationships and knowledge that come with this history are an undeniable advantage to GA.
- Work collaboratively to solve problems.
- Deep understanding of how we develop our advocacy priorities and the impacts of legislation on CWS.
- Elevate the voice and reputation of CWS by encouraging evidence-based policymaking and uplifting the importance of being guided by science.
- Improve the laws and resources benefiting the Tualatin River and surrounding communities.

Scope

- Engagement and advocacy with state and federal partners as it pertains to legislation.
- Overlap with Regional Utility Services department on local government engagement, especially when and where multijurisdictional priorities with higher levels of government are involved.
- Overlap with Regulatory Affairs and Legal Services department on regulatory issues and rulemaking.

Value - Added

- Better laws, more resources.

Abbreviations

ACWA: Oregon Association of Clean Water Agencies
AOC: Association of Oregon Counties
BOD: Clean Water Services Board of Directors
BOR: Bureau of Reclamation
LOC: League of Oregon Cities
NACWA: National Association of Clean Water Agencies
SDAO: Special Districts Association of Oregon
SOD: Safety of Dams



PE Strength & Opportunities



Goal Sharing measure

CWS Values

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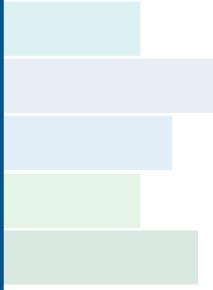
We make great things happen by working and solving problems together.

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Draft, vet & implement comprehensive federal & state legislative agendas	Proactively engage BOD to develop legislative priorities		
		Involve BOD in legislative advocacy to engage elected officials	
	Defend & pursue CWS policy interests that arise beyond agenda		
	Monitor BOR progress & advocate for congressional support of SOD funding for Scoggins Dam		
Establish & maintain positive government relations with federal, state & local governments	Increase understanding & engagement level with stakeholders & partners		
		Participate in DC Fly-In	
	Conduct tours of CWS facilities & Scoggins Dam		
Build credibility, elevate CWS brand & leverage partnerships to bring greater public water sector awareness to policymaking process	Actively participate on legislative committees of state & national organizations like ACWA & NACWA		
	Build coalitional strength with partner advocacy organizations like LOC, AOC, SDAO, environmental, agricultural & business groups		
Strengthen workforce capacity in the legislative process by enhancing technical support through improved engagement & targeted training	Equip staff with essential legislative skills, including process comprehension, bill analysis & effective testimony, to foster meaningful engagement in legislative process		
			Develop “legislative liaisons” in CWS departments
Proactively secure grant opportunities	Develop project readiness capacity to position CWS for grant opportunities		Establish internal protocols for tracking grant awards
		Hire Grants Analyst & establish internal protocols for tracking grant awards	Set initial revenue targets for grant funding

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Establish & maintain positive government relations with federal, state & local governments	Performance measure	Oregon Legislature & legislative committee facility tours & briefings	75%	-	50%	75%



Business Operations & Strategy Department



FY24-26

BOS

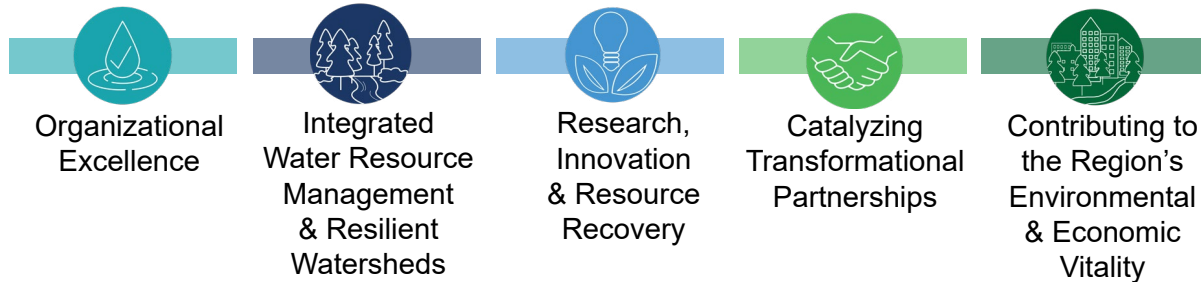
Business Operations & Strategy

Full-time employees: 44

Departmental operating budget: \$17,743,300

The Business Operations & Strategy department supports CWS in delivering exceptional services to customers by overseeing and coordinating key areas of business administration, business development, building and facilities management, equity initiatives, process optimization, risk management, safety, culture development, strategic planning, enterprise performance management, and training. BOS comprises six programs: Administrative Services; Culture, Equity & Learning; Building & Facilities Services; Risk & Insurance Management; Safety; and Strategy Development & Enterprise Performance.

Key Strategic Outcomes (KSO):



Abbreviations

BOS: Business Operations & Strategy
CWIC: Clean Water Insurance Company
LMS: learning management system
PM: preventative maintenance






PE Strength & Opportunities



Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
# of Strategy projects completed	12	0	0	3
# of claims managed	50	55	60	60
# of Safety audits	68	4	22	52
CWIC fiscal year ending fund balance	\$10,000,000	\$5,485,199	\$6,600,000	\$8,200,000

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Gallup Q12 engagement score for organization (grandmean)	4.2	3.95	4.0	4.1
% of workforce engaged in learning activity	100%	N/A	LMS review begins	25%
# of Facilities preventative maintenance work orders	2,000	1,776	1,886	2,000
# Facilities corrective maintenance work orders	1,510	1,135	1,325	1,510
% of compliance found in safety audits (baseline needed)	100%	75%	80%	90%
% of Strategy projects completed	100%			100%
BOS Customer satisfaction rating (1-5)	5			4.0

Objectives	Initiative Statements	KSO
DEPARTMENT		
Satisfied internal customers	Measure & monitor internal customer satisfaction. Develop & implement improvement measures to continuously improve internal customer satisfaction.	
Provide exceptional customer service	Provide exceptional internal & external customer & stakeholder experience through clearly defined service level expectations, agreements & decision-making processes.	
CULTURE, EQUITY & LEARNING		
Highly engaged workforce	Enhance workforce engagement using the Gallup Q12 survey as a diagnostic tool to identify areas for improvement & implement action-planning strategies based on survey findings. This process aims to boost employee satisfaction, productivity & organizational performance by addressing key factors affecting engagement within the workforce.	

Objectives	Initiative Statements	KSO
Equitable & inclusive workplace	Develop metrics that measure & improve CWS' outcomes on equity, diversity & inclusion.	
	Facilitate internal activities that promote culture building, equity building & shared learning (e.g., employee resource groups, employee advisory council, employee celebration events).	
Develop and grow organizational learning program	Refine and implement strategic organizational learning priorities as an integrated, enterprise-wide program.	
FACILITIES PROGRAM		
Prepare new building acquisitions for employee occupancy	Coordinate and implement projects and tasks to prepare the new facilities for employee occupancy.	
Provide well-maintained & secure workplaces	Provide a workplace environment that prioritizes safety, cleanliness & productivity through facility maintenance best practices. Facilities Carry out continuous improvements in workplace standards, regular maintenance, and robust safety measures, to create a space where everyone can thrive and contribute to our shared goals.	
RISK & INSURANCE MANAGEMENT		
Protect CWS from financial loss	Identify & monitor CWS' risk exposures in all areas. Mitigate risk exposures by developing & implementing internal loss prevention activities and improving processes. Monitor & maintain the balance between risk mitigation & financial efficiency.	
Cultivate a culture of resilience	Develop a dynamic, interactive, risk-aware, and safety-aware culture that enables all employees to make risk-informed decisions & enhance CWS' culture of resilience.	
SAFETY PROGRAM		
Employee health, safety, and well-being	Implement programs and initiatives to ensure the health, safety, and well-being of all CWS employees.	
STRATEGY DEVELOPMENT & ENTERPRISE PERFORMANCE		
Enhanced CWS service delivery with strategic consultation to all departments	Offer strategic consultation services to enhance efficiency & effectiveness in CWS operations throughout the organization & enhance customer service deliveries	
Advance Performance Excellence practices	Deploy systematic & repeatable approaches for strategy development & implementation, project delivery & financial planning. Use data-driven insights to guide executive decision-making, empower the workforce to plan & measure for success, enhance business processes & optimize performance improvement systems.	



FY24-26



Administrative Services

The Administrative Services program provides centralized, coordinated, and sustainable business operations across CWS departments and facilities. Program staff serve as service liaisons to departments and programs and communicate CWS business practices, policies, and messages to internal and external audiences.

Goal

- Provide exceptional, efficient, and effective administrative services that meet the needs of stakeholders

Advantage

- Multidisciplinary team dedicated and committed to working collaboratively
- A comprehensive understanding of the organization's business services processes
- Leverage the organization's collective knowledge and expertise
- Balancing daily demands with nimble problem-solving strategies

Scope

- CWS Workforce, Partners, and Stakeholder Groups

Value - Added

- Provides administrative support to enable staff to effectively carry out their roles and sustain business operations
- Coordinates information exchange and knowledge transfer amongst and between workgroups
- Aligns key organizational practices and policies
- Encourages internal networking and cross-departmental collaboration

Abbreviations

CBOO: chief business operations officer

FTE: full-time equivalent or full-time employee

PO: purchase order

SLA: Service Level Agreements

SOP: standard operating procedure

CWS Values

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PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Create consistent practices, processes & resources	Locate & document existing practices & policies		
		Evaluate & update documents; create documentation when needed; suggested policy review & improvement when applicable	
		Support CBOO's policy creation, review & implementation process	
			Support CBOO to operationalize an SOP for organizational policy management (i.e., accessibility, availability)
			Develop a standardized process for service requests across departments
	Develop consistent catering services best practices		Identify a food request tool for CWS-wide use
		Document current office supply inventory & ordering practices	Standardize office supply inventory & ordering best practices
Provide exceptional customer & stakeholder experience			Co-create & define SLA including team expertise, service offerings, internal customers, expectations & capacity
			Develop & document standard methods for decision resolution
	Review & update KSA expectations for job descriptions	Define job description competencies	Begin a staffing gap analysis for resource needs and anticipated growth
		Monitor job descriptions & skill-level expectations	
Fulfill Board liaison duties	Recruit & onboard new staff		
		Train new staff	Analyze practice efficiency
			Update Board liaison practice & procedure documents

Objective	Initiatives		
	FY 24	FY 25	FY 26
Absorb, embrace & echo CWS communications			Identify & develop communication networks & document communication roles, responsibilities & pathways

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Create consistent practices, processes & resources	Service level	# of procedure documents reviewed	100% annually	16	16	16
	Service level	# of processes analyzed & updated	3	2	3	3
	Service level	Cross-training practices established	2	2	2	2
Provide exceptional customer & stakeholder experience	Service level	Define & message team expertise & service offerings	Define			Define
	Service level	Develop a framework for positions then evaluate	1 annually	4	4	4
	Service level	Hold meetings with programs to share the message	5			6
	Performance measure	Request within Service Level Agreement	95%			90%



FY24-26



Culture, Equity & Learning

The CEL program develops, manages, and consults on strategies that make CWS a place where every employee can learn, grow, and thrive, and that enhance the organization's positive impact in the community. Working closely with internal teams and external partners, the program increases employee inclusion and engagement, helps remove CWS barriers to community prosperity, integrates equity considerations into our business practices, and grows CWS as a learning organization.

Goal

- Provide timely, efficient, and effective services that meet the needs of stakeholders
- Align with identified metrics

Advantage

- Executive leadership engagement and board support
- Employee interest in learning, especially in relation to career advancement and to equity,
- Strong relationships between program staff and CWS employees

Scope

- CWS workforce, board, community partners, and consultants

Value - Added

- Sustain and improve employee engagement
- Equity integration:
 - Recruitment, hiring, and retention
 - Apprenticeships and internships
 - Procurement opportunities
 - Culture and equity action
- Grow CWS as a learning organization

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Abbreviations

ABC: Administrative Building Complex
BP: Business Partners
CCE: Communications & Community Engagement
CEL: Culture, Equity & Learning
CEO: chief executive officer
CVI: Core Values Index
DS: Digital Solutions
EAC: Employee Advisory Council
ERG: employee resource groups
GEN: Gender Equity Network
GIS: geographic information system
HR: Human Resources
LMS: learning management system
MCC: Multicultural Committee
OD: organizational development
SAGE: Strategic Advisory Group to the Executive
SME: subject matter expert
VERG: Veterans Employee Resource Group




PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
CULTURE			
Increase employee engagement	Assessment: Implement employee engagement survey		
	Define the Employee Advisory Council work plan, forward action recommendations to the SAGE for implementation consideration	Implement work plan focused on building connections among individuals & groups. Keep group running successfully through participant changes	Continue work on building connections, responding to SAGE requests, following up on EAC recommendations. Add one meeting with learning as a focus
	Continue & enhance Passport peer-to-peer learning		
	Refine Values & integrate into existing policies & programs		Continue to integrate values into new & existing policies, programs & systems
Improve CWS employee communications	Continue planning & implementation to create organizational intranet site.		Support the development of the CWS intranet, including employee engagement in the project
	Support Pipeline content development		Function as SME for content related to organizational culture, organizational learning, & equity/inclusion in Pipeline and other channels. Improve information provided to employees about CEL program & equity on intranet or SharePoint.
	Develop & implement strategic employee communication plan that emphasizes intentionality & proactivity		In partnership with CCE, continually update “menu” of employee communication channels & advise SMEs on how to choose their channels
			Lead communication & engagement strategy for employees who are involved in ABC relocation
	Strengthen cascading systems of communication through BP & other channels		Create satisfaction survey for BP & revise meeting structures/content as needed using results. Strengthen processes for coordinating committee
			Create pilot process for BP & supervisors’ access to information for employees
			Refine Business Partners Connection to heighten its effectiveness as an internal communications channel

Objective	Initiatives		
	FY 24	FY 25	FY 26
Improve CWS employee communications	Develop & implement tactics for CEO & SAGE connection with employees, including written messages, all-staff conversations & more		Review, refine & recommend tactics for CEO & SAGE communication & engagement. Draft written messages & talking points. Organize or contribute to opportunities for live large-scale executive-staff dialogue
Improve employee experience	Complete & systemize organization-wide onboarding	Continue implementing onboarding program; survey each cohort to learn of possible improvements. Create & curate resources for onboarding participants & make them readily available to all employees 	Continue implementation with improvements included. Survey each cohort for ongoing knowledge & improvements
Increase organization development capacity, in partnership with HR		Working with HR, assess OD needs & plan for added capacity as needed	Continue internal conversation about meeting OD needs with internal staff & external consultants
EQUITY			
Create & elevate spaces for belonging in CWS culture	Support ERGs (GEN & MCC)	Support ERGs (GEN & MCC), including the VERG	Provide staff support around publicity, leadership development, event planning & more – for existing ERGs (GEN, MCC & VERG) & future ERGs
	Conduct equity learning for staff		
Create processes to embed equitable strategies into CWS projects & programs	Manage equity lab	Evaluate & adjust equity lab	Evaluate & adjust Equity Lab as needed
	Support & advise on equitable community & partner engagement		
	Develop equity language for incorporation into Principles of Respect	With HR, obtain EAC input & incorporate equity or other belonging language into Principles of Respect	
		Co-manage equity mapping process to provide evidence-based GIS data to inform projects & programs	Support acceptance, integration & use of CWS equity mapping tool
		Outline ideas to provide a standard equitable process to name projects	Co-manage creation of a consistent, equity-informed process to name specific sites & projects

Objective	Initiatives		
	FY 24	FY 25	FY 26
Co-create & help report on equity metrics that align with four desired focus areas	Procurement		
	Culture, equity lens (managed by CEL)		
	Internships, apprenticeships (managed by departments)		
	Hiring, recruitment, retention (managed by HR)		
LEARNING			
Develop & grow organizational learning program	Manage learning program development as an integrated project, weaving in different learning curriculum content as it develops	Refine & implement strategic organizational learning priorities as an integrated, enterprisewide program	Maintain & continue to provide current learning offerings. Evaluate & adjust those offerings. Refine priorities to reflect needs of the organization
		Create ideas to embed, celebrate & integrate learning into CWS culture	Develop written strategy to embed, celebrate & integrate learning into CWS culture
	Refine & continue equity learning program	Offer integrated & embedded equity learning	Offer integrated & embedded equity learning & optional stand-alone equity learning opportunities
	Create leadership development program	Refine & continue Clean Water LEADERS program	
	Identify, learn & expand organizational learning priorities including project management, supervisor skills, onboarding & leadership		Identify & expand organizational learning priorities. Create new curricula as needed
		Evaluate LMS currently in use & determine options. This includes review of user needs, partnership with DS, & market research	Implement LMS choice
Build staff knowledge of best people management practices	Promote supervisor use of Gallup Access tools, track action plans & work with SAGE to support		Promote supervisor use of Gallup Access tools, track action plans & work with SAGE to support. Promote supervisor training as people management priority
	Offer CVI & other talent assessment trainings to new staff		Offer optional use of CliftonStrengths talent assessment, including integration with Gallup employee engagement data & tools

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Increase employee engagement	Performance measure	Participation in employee engagement survey	85% in FY27/28	84%	84%	83%
	Performance measure	Overall employee engagement	4.2 in FY 27/28	Grandmean of 3.95.	Grandmean of 4.0.	Grandmean of 4.01.
	Performance measure	EAC meetings & coordinating committee meetings; EAC evaluation responses	75% positive eval in FY27/28	<ul style="list-style-type: none"> • 71% positive evaluation responses for EAC meetings • Completed annual report to SAGE 	<ul style="list-style-type: none"> • 71% positive evaluation responses for EAC meetings • Completed annual report to SAGE 	<ul style="list-style-type: none"> • 71% positive evaluation responses for EAC meetings • Completed annual report to SAGE
	Performance measure	Improve new employee experience	On-boarding will move into a maintenance mode; no need for metrics		Implement & evaluate four cohorts or organizational onboarding (GS)	Use Gallup data to measure the change in engagement among new employees after the launch of onboarding. Refine onboarding in at least three ways as a result of participant feedback

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Create & elevate spaces for belonging in CWS culture	Performance measure	Number of ERG- sponsored events in fiscal year	8 in FY 27/28	4	5	6
	Service level	Equity learning for workforce	Five equity learning opportunities per year in FY 27/28	Equity learning offered to supervisors at All Leaders meeting	<ul style="list-style-type: none"> • Three optional equity learning opportunities offered to all staff • One equity learning session provided as part of Clean Water LEADERS program 	<ul style="list-style-type: none"> • Four optional equity learning opportunities offered to all staff • One equity learning session provided as part of Clean Water LEADERS program
	Performance Measure	Clifton Strengths pilot project	If evaluation proves positive, 50% of teams use Clifton Strengths in FY 28/29			2 teams receive training on Clifton Strengths & explore integration with Gallup Access
Develop organizational learning program	Service level	Learning Hub recommendation	<p>Each year a plan & strategy for learning to meet employee needs is discussed with learning team</p> <p>Leadership training, onboarding & supervisor training are all offered in FY 28/29</p>	<p>CWS staff implements Learning Hub recommendations by offering:</p> <ul style="list-style-type: none"> • Leadership development cohort (1- multiple months) • Project management basic training (1- Laura Porter) • Supervisor training- designed/ offered by HR • Onboarding experience (1-multiple months) 	2 Clean Water LEADERS cohorts started in calendar year. Strategy developed & approved by learning team & sponsors for future learning priorities. Organizational onboarding serves four new cohorts in FY	2 Clean Water LEADERS sessions started in calendar year. Supervisor training completed & implemented. Organizational onboarding serving all new regular employees. Two new learning opportunities offered.



FY24-26



Facilities Maintenance

Facilities Maintenance provides operations, support, and maintenance of CWS facilities and is responsible for 16 occupied buildings and 86 treatment process (unoccupied) buildings across 10 campuses in Washington County. This program ensures the functionality, sustainability, and efficiency of these buildings, their physical security systems, and landscaped areas by being responsible for day-to-day operations and maintenance of building systems and structures, as well as maximizing the useful life and utility of the buildings by implementing a long-term asset management program.

Goal

- Timely, efficient, and cost-effective services that meet the needs of stakeholders

Advantage

- A dedicated team that takes ownership of their responsibilities and places a high value on delivering excellent customer service
- Technical knowledge and expertise in facility asset management, including Lucity management system and a deep understanding of building systems
- Fiscally conscious and efficient management of CWS resources, with a focus on optimizing costs and achieving the best value for CWS' investment
- Strong relationship-building skills, with the ability to effectively collaborate and communicate with all CWS employees
- A management approach that is supportive, open, and transparent, with a focus on acknowledging and rewarding employees' effort and providing immediate, direct, specific, and calibrated feedback
- A commitment to creating a positive culture and team-based work environment and encouraging employees to share their ideas and opinions
- Excellent contract preparation skills, with the ability to re-prioritize and troubleshoot as needed to meet the program's evolving needs and requirements

Scope

- All CWS facilities and building assets within CWS property boundary

Value - Added

- A dedicated team that takes ownership of their responsibilities and places high value on delivering excellent customer service
- Technical knowledge and expertise in facility asset management, including Lucity maintenance management system and a thorough understanding of building systems, physical security, and landscaping
- Fiscally conscious and efficient management of CWS resources, with a focus on optimizing costs and achieving the best value for CWS' investment
- Strong relationship-building skills, with the ability to effectively collaborate and communicate with all CWS employees
- A management approach that is supportive, open, and transparent, with a focus on acknowledging and rewarding employees' efforts and providing immediate, direct, specific, and calibrated feedback
- A commitment to creating a positive culture and team-based work environment and encouraging employees to share their ideas and opinions
- Excellent contract preparation skills, with the ability to re-prioritize and troubleshoot as needed to meet the program's evolving needs and requirements

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Abbreviations

ABC: Administrative Building Complex facility
CMMS: computerized maintenance management system
EV: electric vehicle
FO: Field Operations facility
HVAC: heating, ventilating, and air conditioning
O&M: operations and maintenance
ripl: Research+Innovation+Partners+Labs
TPS: Treatment Plant Services
WRRD: Water Resource Recovery Operations & Services department



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADMINISTRATIVE			
Develop policy, process & design procedures for facility services	Develop high-priority design standards, policies & procedures		Develop policies for facility security, EV charging, outside use of meeting spaces
Learning & growth opportunities	Relevant level of training on CWS facilities	Expert level of training on CWS facilities	Create an initiative to cross-train staff on facilities that are outside their normal assigned work locations to increase familiarity with & provide backup when personnel resource & workload reallocation is required
PROVIDE FACILITY MAINTENANCE SERVICES & RENOVATION			
Support office space planning		Participate in the construction planning process of the Central, ripl & Springer facilities	Integrate landscaping design & planning into resource recovery capital projects at the start of those project
Manage janitorial & landscape services	Manage & amend Relay Resources contract services as needed		Manage contractor, contract amendments & renewals of Relay Resources janitorial & landscape services contracts
Provide elevator maintenance services	Monitor & assess condition of all CWS elevators		Manage contractor, contract amendments & renewals of elevator support services contract
Provide HVAC maintenance services			Manage contractor, contract amendments & renewals of HVAC preventative maintenance services contract
EXTEND LIFE, REPAIR & REPLACE ASSETS			
Maintain, repair & renew critical occupied building infrastructure	Replace security access & alarm system at Rock Creek Engineering	Replace security, access & burglary alarm system at FO	Replace security, access & burglary alarm system at Durham

Objective	Initiatives		
	FY 24	FY 25	FY 26
Maintain, repair & renew critical occupied building infrastructure			Plan & lead roofing systems lifecycle replacements
IMPLEMENT CMMS FOR FACILITIES			
Facilities maintenance management	Utilize Lucity to monitor, learn & adjust maintenance procedures & schedules & identify required resources including corrective maintenance		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actuals FY 24	Estimate FY 25	Estimate FY 26
Hire & onboard staff to perform mission-critical work	Performance measure	Onboard	100%	100%	100%	
Support office space planning	Performance measure	Office space planning milestones Meet schedule expectations	100%	100%	100%	
Manage janitorial services	Performance measure	Internal customer complaints	3<	3<	3<	
Maintain, repair & renew critical unoccupied building infrastructure	Performance measure	Rock Creek Digester Complex elevator milestones Meet schedule expectations	90%	90%	90%	
Replace assets at end of useful life	Performance measure	End of useful life milestones Meet schedule expectations	90%	90%	90%	
Replace assets at end of useful life	Performance measure	End of useful life milestones Meet schedule expectations	90%	90%	90%	

Objective	Metric	Measure	Target	Actuals FY 24	Estimate FY 25	Estimate FY 26
Facilities maintenance management	Service level	Lucity management milestones		Compile and confirm required maintenance tasks	Upload maintenance tasks into Lucity	
	Performance measure	Meet schedule expectations	95%	95%	95%	
	Performance measure	Meet schedule expectations	100%	100%	100%	



FY24-26



Risk & Insurance Management

Risk & Insurance Management supports the strategic objectives of Clean Water Services by bringing a systematic and principled approach to proactively managing the portfolio of the risks and opportunities that are critical to achieving CWS' mission and strategic goals. This is accomplished by identifying, evaluating, and mitigating risk to reduce the frequency and severity of adverse events related to workers compensation, general liability, auto liability, and property coverages. Focus areas include risk financing (commercial, self-insurance, captive insurance programs), enterprise risk management, claims management, loss prevention, and employee safety.

Goal

- Timely, efficient, and effective services that meet the needs of stakeholders
- To develop a dynamic, interactive, risk-aware culture that enables decision-makers to make risk-informed decisions and enhance CWS' culture of resilience

Advantage

- Experience, knowledge, and exceptional mentoring resource
- Skills and expertise in risk management
- Understanding best industry practices and advocating for CWS
- Cultivating relationships and fostering effective communication across the organization
- Well respected within the risk and insurance industry
- Risk management software expertise

Scope

- Ensuring continuity of operations for CWS, our employees, our assets, the public, and the environment

Value - Added

- Protecting people and property
- Helping CWS identify and assess risks and opportunities
- Creating and supporting a culture of safety for employees and public
- Building a culture of resilience and psychological safety
- Helping employees get back to work after an injury
- Ensuring financial resources to minimize the impact of loss to CWS
- Providing education and reporting services
- Monitoring threats and keeping informed on industry best practices, trends, claims, and losses
- Developing strategies to minimize risk and take advantage of opportunities
- Implementing programs to reduce frequency and severity of loss
- Managing the total cost of risk for CWS
- Monitoring market trends and adapting programs

CWS Values

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We make great things happen by working and solving problems together.

Abbreviations

BP: Business Partners
CCE: Communications & Community Engagement
CEL: Culture, Equity & Learning
CWIC: Clean Water Insurance Company
DART: days away, restricted, or transferred (used to measure workplace safety)
DS: Digital Solutions department
EOC: Emergency Operations Consortium – [CONFIRM]
FEMA: FM Global: Factory Mutual Insurance Company
HR: Human Resources department
IRMI: International Risk Management Institute
Marsh USA: CWS' broker of record for property and casualty insurance programs
NIMS: National Incident Management System
SAIF: Oregon's not-for-profit workers' compensation insurance company.
SDAO: Special Districts Association of Oregon
SDS: safety data sheet
TPA: third-party administrator
TPS: Treatment Plant Services
WC: workers compensation



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Administration	Administer Origami risk management information system, including providing data to inform decision-making & identifying threats & opportunities		
	Develop claims & safety program data dashboard	Communicate effectiveness of claims & safety program with leadership using data dashboards	
	Building Origami employee health and safety portal modules & data collection to align with CWS practices		
	Train & educate staff on incident reporting	Partner with CEL, CCE, & HR to expand Origami training & incident reporting	
	Partner with DS & Safety to implement mobile modules & SDS program		
		Partner with Procurement & Legal on updating contract language & contract review & analysis	
		Partner with Procurement & Legal to develop internal contract requirement tool	Partner with CEL & CCE to disseminate internal contract requirement tool across CWS departments
	Educate contract administrators & project management on contractual risk transfer mechanisms	Partner with contract administrators to ensure appropriate contract requirements are addressed	
Risk identification	Implement contract vendor management risk analysis tools for cyber insurance	Partner with cybersecurity program to implement systems that reduce cyber insurance	Partner with cybersecurity program to implement systems that reduce cyber insurance
	Implement programs & policies to mitigate exposures	Implement & monitor programs & policies to mitigate exposure	
	Build relationship between FM Global, Facilities & TPS throughout design & build phases of construction	Enhance & monitor relationship between FM Global, Facilities & WET throughout design & build phases of construction	

Objective	Initiatives		
	FY 24	FY 25	FY 26
RISK FINANCING			
Commercial insurance	Manage relationship with FM Global property insurance, including underwriting, statement of values, building facility evaluations & negotiating policy terms & conditions that align with CWS needs		
		Monitor & evaluate earthquake limits, including modeling to ensure CWS is appropriately insured	Monitor & evaluate earthquake limits & layering options to supplement existing product
	Send staff to FM Global policy holder meeting & workshops		Send staff to FM Global policy holder meeting & workshops
	Managing relationships with Special Districts Association of Oregon (SDAO), including liability, general, auto, and workers compensation insurance		
	Evaluate SDAO with Marsh and evaluate risk and ensure that any gaps found are considered		
	Go live with SAIF for new claims, including alignment of policies & procedures & Origami data transfer	Conducted a feasibility study to reassess the WC program	Evaluate feasibility study to determine insurance options
	Audit WC codes for categorization & correct payment	Annual SAIF audit to include proper payroll & appropriate WC codes for all new hires	
	Manage relationship & policy with cyber insurance provider		
	Partner with DS & host cybersecurity training seminar & tabletop exercises	Leverage MARSH resources to conduct tabletop exercise	
		(GS) Create digital risk register for cybersecurity in Origami Risk	Advance current programs to negotiate lower premiums
	Complete transition of workers compensation program to SAIF		
	Explore opportunity to leverage SAIF & SDAO loss prevention programs	Use SDAO loss prevention resources to enhance CWS programs	
Self insurance	Manage Fund 102, ensuring that CWS has adequate reserves for current & potential future claims		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Captive insurance	Manage captive insurance program, including developing policies, budgets & financial management. Manage vendor relationships, including legal, actuaries, banking, auditors & captive manager		
	Capitalize on CWS use of captive by looking for opportunities to grow program (climate program, unemployment, equipment maintenance & breakdown, property difference in conditions)	Capitalize on CWS use of captive by looking for opportunities to optimize program	
		Develop captive insurance program strategic plan	Use strategy report to optimize captive insurance offerings
Enterprise risk management			Develop & conduct survey with leadership to understand perceived risk of loss from a frequency & severity perspective
	Aggregate results from survey to develop a risk register		
Claims management	Administrate WC, including acting as liaison between insurance company, management & employee		
	Administer property, liability, auto & subrogation program & coordinate with SDAO & FM Global		
	Provide incident analysis training for supervisors		Provide loss control trend data ...
Supporting loss prevention & employee safety	Liaison between facilities & FM Global, Engineering & consulting services	Liaison between & FM Global consulting services & TPS	
	FM Global training with superintendents to better understand property loss prevention & budgeting	Provide training with superintendents to better understand property loss prevention	
	Ensure FM Global standards are adopted as a best practice across CWS facilities		
	Facilitate loss control services (SDAO, FM Global, SAIF, claims TPA) from insurance carriers to CWS		
	Administer risk policies & procedures		
Succession planning	Professional development for all staff in program		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Risk financing	Service level	Workers' compensation experience modification factor	0.68	0.87 (2023 calendar year)	0.75 (2024 calendar year)	0.75
Claims management	Performance measure	General liability loss ratio (CWIC)		30%	30%	
	Performance measure	Number of automobile physical damage claims	7	11	20	15
	Performance measure	DART score		0.34%	1.00%	1.00%
	Performance measure	WC indemnity claim as a percentage of total WC claims	15%	17%	15%	20%
Managing emergencies	Service level	Accommodate 100% return to modified work releases	100%	100%	100%	100%
Supporting loss prevention	Performance measure	Ending fund balance in CWIC	\$10,000,000	\$5,485,199	\$6,600,000	\$8,200,000



FY24-26



Safety

Safety is responsible for developing, implementing, and managing programs and initiatives to ensure the health and safety of CWS employees and ensure compliance with Oregon Occupational Safety and Health Administration regulations and CWS policies. Group members serve as CWS' safety experts and partner with Risk Management, CWS leadership, and other departments to drive the continual development of a world-class safety culture and manage the implementation of safety policies, guidelines, processes, and training.

Goal

- For safety to be a shared responsibility among all workers, empowering them to speak up about safety issues, and take action to prevent accidents and injuries

Advantage

- Highly skilled and passionate professionals who prioritize the safety and well-being of all employees
- Facilitate and strengthen safety-related communications among teams and across work groups
- Leadership commitment to Safety program

Scope

- Promote safety with CWS employees and contractors

Value - Added

- Foster a culture of safety and empower employees to feel safe and supported at work
- Ensure that staff members are trained and equipped to work safely and productively
- Reduce accidents and injuries to ensure that all employees return home safely at the end of the day
- Reduce financial and emotional costs of injuries and accidents including lost productivity, increased insurance premiums, and potential legal liabilities
- Meet or exceed safety regulations and compliance

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Abbreviations

ABC: Administrative Building Complex

CEL: Culture, Equity & Learning program

CIP: Capital Improvement Program

CWLO: Clean Water Learning Online

DS: Digital Solutions department

GS: Goal Share, Goal Sharing

JSA: Job Safety Analysis

LSC: Local Safety Committee

NSES: Natural Systems Enhancement & Stewardship department

O&M: operations and maintenance

OR-OSHA: Oregon Occupational Safety and Health Administration

R&R: rewards and recognition

RAD: Regulatory Affairs department

SDS: Safety Data Sheets

SME: subject matter expert

UOPS: Utility Operations & Services department

TPS: Treatment Plant Services

WET: Water & Engineering Technology department

WRRD: Water Resource Recovery Operations & Services department



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
PROMOTE EMPLOYEE HEALTH, SAFETY & WELL-BEING			
Manage & monitor safety recognition program	Implement annual Safety R&R program & celebrations for WRRD, UOPS & RAD	Conceptualize, develop & implement Safety R&R program	Standardize annual safety recognition program
		Extend R&R to ABC LSC	Utilize LSC leadership group for monitoring safety recognition program performance & appetite
		Solicit input from LSC leadership group	
	Introduce concept & invite ABC representatives to attend WRRD R&R events		
	Analyze & develop Safety Incentive Program, integrate existing platforms	Continue developing Safety Incentive Program across CWS	Implement & manage Safety Incentive Program across CWS
		Extend Safety Silver Dollar to ABC LSC	
Develop, monitor & improve LSC OSHA compliance	Recruit members & charter a LSC for ABC	Monitor, learn & adjust LSC platforms to ensure OR-OSHA compliance	Create & schedule annual LSC audits focusing on OR-OSHA recordkeeping requirements
		Partner with LSC leadership group to standardize best practices across CWS	Partner with LSC leadership group to monitor individual & global LSC performance
		Add WET workgroup to ABC LSC	
		ADMINISTER SAFETY COMPLIANCE	
Provide Safety Data Sheets (SDS) management	Monitor, learn & adjust performance of SDS management system	Monitor & adjust performance of SDS manager	
		Organization outreach to provide SDS manager training for all affected staff	Monitor & adjust SDS manager training for all affected staff
Provide CWL Online safety training	Finalize & upload modules for NSES into Absorb	Monitor, learn & adjust performance of CWL	Partner with CEL to enhance delivery & recordkeeping of CWS safety training

Objective	Initiatives		
	FY 24	FY 25	FY 26
Administer Job Safety Analysis (JSA) program		Partner with DS to source & select adequate 3rd party JSA software	Implement selected JSA software. Create policy & procedure to support JSA training & deliverables
Administer safety program auditing system		Update Safety policies & procedures to ensure OR-OSHA compliance	
		Develop systems to audit recordkeeping, training & field compliance	Implement systems to audit recordkeeping, training & field compliance
DEVELOP WORLD-CLASS SAFETY CULTURE			
Manage & monitor CWS safety policies	Update as necessary changes to CWS safety policies	Review & update all CWS safety policies & procedures to meet OR-OSHA compliance	
		Develop system to ensure annual updates of all CWS safety policies & procedures	Implement system to ensure annual updates of all CWS safety policies & procedures
Manage comprehensive safety CIP	Monitor, learn & adjust performance of Safety CIP		Provide equitable resources to all CWS programs

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actuals FY 24	Estimate FY 25	Estimate FY 26
Promote employee health, safety & well-being	Service level	Provide global solution for Safety Incentive Program	100%	Implement Safety R&R pilot for UOPS and RAD	Develop CWS Safety Incentive Program	Implement & monitor Safety Incentive Program
	Performance measure	Meet schedule expectations	100%	100%	100%	
	Performance measure	Safety analyst LSC meeting attendance	90%			90%
	Performance measure	Meet schedule expectations	100%	100%	100%	100%
	Performance measure	Expand the Safety Silver Dollar program	100%	100%	100%	
	Performance measure	Meet schedule expectations	100%	100%	100%	100%
	Performance measure	Meet schedule expectations	100%	100%	100%	100%
	Service level	Administer Job Safety Analysis (JSA) program		Evaluate JSA Software	Origami training for Safety team	Origami training for Safety team
	Performance measure	Meet schedule expectations	100%	100%	100%	100%
Develop world-class safety culture	Service level	Update CWS safety policies	Review & update all CWS safety policies in partnership with Risk	Review and update all CWS safety policies in partnership with Risk	Review and update all CWS safety policies in partnership with Risk	Review and update all CWS safety policies in partnership with Risk
	Performance measure	Meet schedule expectations	100%	100%	100%	100%
	Service level	Consolidate all CWS Safety CIP spending	Analyze and improve budget	Receive budget approval for CWS Safety CIP	Develop budget and seek approval for Safety CIP	Analyze and improve budget
	Performance measure	Meet schedule expectations	100%	100%	100%	100%
Administer safety program auditing system	Service level	# Safety Audits	52	4	4	22
	Performance measure	% of compliance found in safety audits (baseline needed)	100%	75%	80%	90%



FY24-26



Strategy Development & Enterprise Performance Management

Strategy Development & Enterprise Performance aims to optimize business processes by guiding CWS' strategic planning and implementing data-driven decision support systems. This will be achieved through collaboration, effective facilitation, and internal networking to enhance organizational resilience and drive the planning and implementation of strategic initiatives that serve both the organization and the community.

Goal

- Timely, efficient, and effective strategy and performance services that meet the needs of stakeholders
- Lead or support cross-departmental high-priority projects that meet CWS strategic business needs

Advantage

- Wide range of professional expertise in organizational change, relationship management, and facilitation
- Advancing a positive workplace culture that reflects our organizational values.
- Embracing a culture of continuous improvement
- High level of professionalism, low level of ego
- Adopting a systems, or CWS-wide, perspective to organizational operations
- Skilled in project management and delivery, financial planning, and water environment sector
- Highly motivated team ready to take on CWS challenges in a positive and meaningful way

Scope

- CWS executive, department, division, and program leadership

Value - Added

- Deployment of a systematic and repeatable approach to strategy development, project delivery, and financial planning
- Documenting key work processes to improve organizational performance
- Using data to inform executive decision-making
- Empower workforce to plan and measure for successful and equitable outcomes
- Ensuring reliable and predictable rates for our customers
- Identify and mitigate risk and resiliency threats
- Improve business processes
- Optimize performance improvement systems

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Abbreviations

ABC: Administration Building Complex
BP: Business Partners
BPOP: business performance and optimization projects
CCE: Communications & Community Engagement
CEL: Culture, Equity & Learning
CIP: Capital Improvement Program
DS: Development Services
ES: Environmental Services
FO: Field Operations
FY: fiscal year
GHG: greenhouse gas
GS: Goal Share, goal sharing
HR: Human Resources
MHY: Material Handling Yard
OFI: opportunities for improvement
PE: Performance Excellence
PENW: Performance Excellence Northwest
RNG: renewable natural gas
SAGE: Strategic Advisory Group to the Executive
SDC: System Development Charges
SDEP: Strategy Development & Enterprise Performance program
SOD: Safety of Dams water supply project
SPP: strategic planning process
WET: Water, Engineering & Technology department




PE Strength & Opportunities




Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
PEOPLE STRATEGY			
Create an Environment for Success	Finalize the purchase of a new administrative building	Implement change management & communications plan	Implement ABC relocation change management & communications plan in partnership with CEL
	Initiate building upgrades & tenant improvement activities in the new building	Finalize building upgrades & tenant improvements in the new building	Make progress on upgrades & reconstruction of the new building in partnership with Facilities
	Build change management & communication plans		Move staff to new location
Advance a Positive Workplace Culture	Collaborate with CEL on developing an equity mapping tool for CWS	Co-manage equity mapping process to provide evidence-based GIS data to inform projects & programs	Support acceptance, integration & use of CWS equity mapping tool
	Collaborate with CEL on communication, engagement & change management for ABC relocation project		Change management for ABC relocation project
	Collaborate with CEL to support learning opportunities for all staff		
	Collaborate with HR on developing a wellness program, developing a recognition program, learning opportunities		Collaborate with HR to provide strategic & facilitation services for implementing roadmap items
ORGANIZATIONAL STRATEGY			
Advance Strategy Development	Administer update of program & department roadmaps FY23-25	Administer update of program & department roadmaps FY24-26	Administer update of program & department roadmaps FY24-27
		Align department & program roadmap updates with budget decision-making timeline (i.e., updates due 11/1/2024)	
		Conduct BP department & program Roadmap OFI assessment & implement improvements	
		Conduct Roadmap Satisfaction & OFI survey with all program & department leads	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Advance Strategy Development		Partner with CCE to streamline program & department improvements	
		(OFI) Revise, improve & deploy SPP	(OFI) Deploy & measure effectiveness of SPP
Develop climate action framework & strategies	Define what climate variables, hazards & approaches we use to guide the continuum of work	Update Climate Action Strategic Roadmap with revised strategic objectives & strategic initiatives	
	Update Climate Action Strategic Roadmap with revised strategic objectives & strategic initiatives	Develop implementation plan for strategic roadmap for effective integration into department & program roadmaps	
PERFORMANCE MANAGEMENT			
Improve Information & Outcome-based decision making	Monitor department performance management website		
	Provide performance management training to roadmap teams	Develop SAGE performance management dashboard & process	Monitor SAGE performance management dashboard & process
			
		Conduct & evaluate ClearPoint beta test with Capital Planning & WRRD	
			Partner with CCE to develop performance management briefing book brand
	Develop the evaluation of decision-making quality		
PERFORMANCE EXCELLENCE			
Advance business process maturity	Host PE learning site visit	Develop & administer implementation of PE OFI plan	Administer implementation of PE OFI plan
	PE senior leadership training: all leaders		PE training for all leaders
GOAL SHARING			
Improve strategy implementation	Develop policy & procedures		Develop & publish policy & procedures
		GS leadership training: all leaders	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Improve strategy implementation		Create & monitor GS participation metric Work with program & division leadership to execute GS quota initiative	Monitor GS program quota
PROJECT DELIVERY STRATEGY			
Catalyze internal customer partnerships & relationships	Support project manager on Long-Term Regulatory Compliance Strategic Roadmap & Climate Action Strategic Roadmap		Support RAD's implementation of Long-Term Regulatory Compliance Strategy using a risk management & portfolio management framework
	Support use of integrated planning project delivery tools with integrated planning coordination team & trainings workshops	Update & edit integrated projects - project delivery tools	Begin developing a Project Management Manual with WET
		Based on results of FY23-24 surveys of project teams, host project management trainings to increase understanding & awareness of common project management industry expectations	Create strategic plan for high-level project management maturity at CWS
			Provide project management training
Implement project portfolio management	Pilot project portfolio management with CWS board initiatives & Asana	Continue to expand project portfolio management across CWS	Develop long-term strategy for implementing portfolio management at CWS
Deliver organizational strategy	Research, develop & implement project management training	Research, develop & implement project management training	Implement project management training in coordination with CEL
			

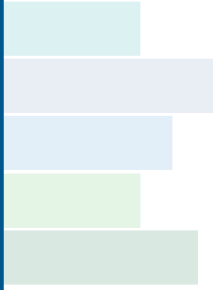
Objective	Initiatives		
	FY 24	FY 25	FY 26
Deliver organizational strategy	Define program development process	Partner with CCE to develop stakeholder engagement strategy	Develop & begin implementing communication strategy for Long-Term Regulatory Compliance Strategic Roadmap that also exemplifies how risk & portfolio management approach improves organizational alignment with CWS goals
		Deploy template for program development process	Begin implementing steps to build project management office (program)
FINANCIAL STRATEGY			
Study & update rates, fees & financial plan	Complete updated Cost of Service Study & long-term financial planning (3-year cycle)		
			Complete system development study & update CWS SDCs (5-year cycle)
Develop & maintain CWS financial policies & procedures	Partner with Finance & Accounting to develop reserve fund policy to support future rate, fee & financial plan updates		
Ensure Department-Specific Fee Schedules Support Adequate Cost Recovery		Plan for review fee schedules for recovering costs associated with services provided - priority groups: ES, FO, DS	
Support CWS financial decision-making	Evaluate financial impact of SOD & CIP on ratepayers		
	Financial analysis & planning for “new” top-priority business areas, contracts & projects		
BUSINESS PERFORMANCE OPTIMIZATION STRATEGY			
Improve program performance	Develop formal process for screening & assigning BPOP projects		Implement standardized tool & process for screening & assigning Strategy team projects

Objective	Initiatives		
	FY 24	FY 25	FY 26
Improve program performance		Develop standardized tool & process for evaluating program efficiency & effectiveness	
		(OFI) Develop & administer implementation of CWS performance improvement system	
	Work with FO to collect data, analyze & evaluate fleet review & Material Handling Yard projects		Develop strategic project prioritization process
Pursue new business opportunities	Negotiate contract with NW Natural on RNG project	Pursue internal resource recovery projects that generate nonrate revenue	Determine legal nonrate revenue opportunities under ORS 451
	Negotiate contracts with digester feedstock suppliers to increase biogas production		
	Develop formal process for screening & prioritizing potential business opportunities		Develop & implement formal process for screening & prioritizing potential business opportunities
		Develop metrics to assess business performance	
	Begin Rock Creek cogeneration project	Negotiate new business opportunity partnership agreements	
	Prepare business plan for customer GHG emissions reduction program		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 23	Estimate FY 24	Estimate FY 25
Advance business process maturity	Service level	Number of PE OFI projects initiated	12	0	6	9
Catalyze internal customer partnerships and relationships	Service level	# of integrated projects using project delivery tools	4	1	4	4
Implement project portfolio management	Service level	# of project portfolios actively managed; managers using project portfolios to make decisions	4	2	2	4

Objective	Metric	Measure	Target	Actual FY 23	Estimate FY 24	Estimate FY 25
Deliver organizational strategy	Service level	# of project managers attending classes annually	15		15	15
Engagement opportunities & communication for relocation in partnership with CEL & Facilities	Service level	# of engagement & communication opportunities provided to staff for move readiness & information on project progress	12		12	12
Update Climate Action Strategic Roadmap	Performance measure	Update Climate Action Strategic Roadmap	1		1	1
Advance a positive workplace culture	Performance measure	% of departments & programs receiving support for projects/initiatives that advance a positive workplace culture satisfied with services received	100%		100%	100%
Improve strategy implementation	Performance measure	Percentage of employees participating in a GS	90%	41%	50%	55%
Advance Strategy Development	Performance measure	Percentage of roadmap leads that are satisfied with the overall roadmap program	90%		71%	76%
	Performance measure	Percentage of roadmap leads that are satisfied with strategy team & graphics team customer service	90%		88%	89%
	Performance measure	% of roadmap leads that are engaged or highly engaged in roadmap program	90%		36%	40%
	Performance measure	% of department roadmaps that met updated due date	90%		36%	40%
	Performance measure	% of program roadmaps that met updated due date	90%		52%	58%



Digital Solutions Department



FY24-26

DS

Digital Solutions

Full-time employees: 28

Departmental operating budget: \$11,067,900

Digital Solutions provides the technical foundation and support to enable business operations, enhance productivity and collaboration, improve business efficiency, and promote data-driven decisions across CWS. Digital Solutions includes IT Business Applications and IT Infrastructure plus two new programs — IT Client Services and Geographic Information Systems. DS develops, manages, and integrates enterprise software, delivers network and systems infrastructure, organizes data governance and structure, provides and supports end-user devices, delivers central geographic information systems services (GIS), and offers general technical support for CWS.

DS delivers these services through three primary pillars: information technology applications, information technology infrastructure, and cybersecurity. DS develops, manages, and integrates enterprise software, delivers network and systems infrastructure, organizes data governance and structure, provides and supports end-user devices, maintains a robust cybersecurity program, and offers general technical support for CWS.

The Information Technology (IT) Applications program provides application development and deployment, software system maintenance, workflow automation, business intelligence, system integrations, and data services to CWS. The IT Infrastructure program provides the network, including WiFi, performs server implementation and management, maintains the data centers and phone system, and is responsible for system backups and annual device replacements. Additionally, the service desk supports devices such as laptops, desktops printers, and conference room equipment and is available for general technical support.

Key Strategic Outcomes (KSO):



Abbreviations

BUG: Broadband User Group
 CG: ChangeGear
 DS: Digital Solutions
 ERP: enterprise resource planning
 FTE: full-time equivalent or full-time employee
 HR: Human Resources
 IoT: Internet of Things
 IT: information technology
 KB: knowledge base
 KPI: key performance indicators
 OT: operational technology
 PCI: payment card industry
 pen: penetration
 SCADA: supervisory control and data acquisition systems













PE Strength & Opportunities














Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
FTEs filled	100%	79%	90%	95%
IT policies maintained	15	8	12	15
Average tickets received per month (CG + Asana form)	1,000	634	925	1,000

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
End user satisfaction	10	Not tracked	9.64 / 10 "Very Satisfied"	9.64 / 10 "Very Satisfied"
Employee engagement (Gallup)	4	3.51	3.6	3.75
Software budget growth	10%	\$2,353,794 / \$2,225,077 = 5.8% increase	\$3,100,100 / \$2,353,794 = 31.7% increase	\$3,500,000 / \$3,100,100 = 12.9% increase

Objective	Objective Statement	KSO
Increase capabilities & maturity of cybersecurity program	Implement & maintain cybersecurity tools & processes to monitor & protect CWS networks & technological infrastructure.	
	Provide annual cybersecurity training for all employees & perform quarterly phishing testing to promote cyber threat awareness & determine high-risk areas to address.	
	Perform annual penetration testing to determine attack vectors & categorize risk of threats. Use findings from pen test & other sources & systems to prioritize items to address & mitigate.	
	Continue implementations to protect SCADA system, the technological layer that helps manage & control physical critical infrastructure. SCADA systems must be completely isolated, hardened & reviewed to ensure they are secure & safe. Continue to increase visibility to endpoints for better insights & awareness.	
Build data management framework & systems to support data-driven decision-making	Create & use necessary cloud infrastructure to create data pipelines, data warehouse & reporting databases in support of CWS business intelligence, data centralization & modeling needs. Continue to increase support capabilities & tools to create KPIs, dashboards & data visualization. Participate in execution of the data management master planning project Phase 1 & Phase 2, as necessary. Coordinate digital twin fusion team for continued collaboration with CWS departments on digital twin initiatives.	
	Implement new Data Management & Governance policy to provide framework for data management & governance & use that policy to drive implementation of data classification & capture of metadata.	
Modernize & innovate	Explore & leverage cloud infrastructure, cloud software & identity management while updating, maintaining & refactoring CWS applications. Continue to reduce technical debt through the consolidation & sensible control of the number of applications used across CWS.	
	Remote apps availability and access.	
	Extend network to the cloud, migrate data center to secure, purpose-built facility, improve backups, replace network & server equipment with modern specs, explore relationship with BUG.	
	Develop & pilot components needed for a robust IoT sensor network, creating a cohesive & unified application & hardware platform that is scalable & functional in various usages & locations across CWS.	

Objective	Objective Statement	KSO
Workforce development	Identify & encourage learning & training opportunities for all DS employees.	
	Continue to assess positions & job descriptions to allow for growth opportunities & upward mobility.	
Customer service	Perform quarterly check-in meetings with each department to ensure regular communication about ongoing projects & upcoming initiatives & continue to explore feasibility of implementing a new ERP system, to potentially replace the current ERP, capital planning & budgeting systems as well as augment HR processes & other related business operations.	
	Single point of entry, desk coverage, phone answering, response time, professionalism, customer satisfaction, communication, change management process, and Change Advisory Board.	
Regular equipment replacement & renewal	Through annual replacement cycles & additions, keep IT infrastructure, network equipment & user devices up to date, meeting the evolving specifications of modern use-case requirements.	
Documentation	Improve & expand documented code bases, processes & procedures, metadata, knowledge base articles & training materials across all IT disciplines.	
Enhance IT governance	Implement additional IT frameworks & related processes, including a software budgeting & procurement approval process, establishing an IT steering committee & formalizing IT project management processes.	
	Create & maintain policies to define & enforce expectations around cybersecurity practices, software purchasing & other IT-related policies.	
System availability & disaster recovery	Provide high system availability & uptime.	
	Ensure that all production systems are backed up at the appropriate frequency & test restore processes annually.	
Automation	Develop automated internal and external business processes to increase efficiency and effectiveness.	



FY24-26



Geographic Information Systems

The centralized Geographic Information Systems (GIS) program is tasked with developing and executing a complete strategy to manage, coordinate, and analyze geospatial data and services for CWS. The program has been created to unify GIS-centric roles from several departments to efficiently support process improvement, modeling, teamwork, and collaboration throughout CWS, partner agencies, and the community. Members of the GIS team maintain maps, layers, and related data; perform data collection, management, and transformation; manage GIS projects; and provide technical administration and support for geospatial systems. Program employees collaborate with and support all other departments that rely on GIS data and systems to perform their work.

Goal

- Timely and effective GIS systems and services that meet the needs of CWS users, regional partners, and community members.

Advantage

- Employees with complementary skill sets in geospatial systems and services, able to define and deliver standard GIS services to meet the broad needs of CWS.

Scope

- CWS departments and employees, community members, and regional partners

Value - Added

- Provide GIS-related services to meet the needs of all system users
- Define a clear strategic direction for GIS systems and their use
- Engage with internal and external partners to understand and meet their needs

Abbreviations

DS: Digital Solutions department

FO: Field Operations

GIS: geographic information system

PDP: professional development plan

WET: Water & Engineering Technology department

WRRD: Water Resource Recovery Operations & Services department

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Establish centralized GIS program		Establish centralized workflow for GIS work requests	
	Develop GIS Manager job description, recruit & hire		
	Establish GIS governing committee	Develop GIS policies, procedures, processes, roles & responsibilities	
	Analyze current GIS tasks performed & determine which projects, tasks, processes & services will be responsibility of new GIS program	Review division of responsibilities, adjust & refine as necessary	
		Implement a central GIS hub for CWS to serve anyone looking to access GIS data & documents	Further implement the GIS strategy – create a GIS strategic master plan
Provide regional coordination of system planning		Partner with internal stakeholders & co-implementing cities to ensure maintenance & accuracy of a regional GIS (utility import & asset transfer)	
		Implement a co-implementers asset transfer process based on new IGAs	
		Manage data readiness program, implement data reviewer process for city data imports	
	Continued coordination & support of GIS services for CWS programs related to sanitary & surface water systems		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Provide transparent, efficient, effective local plan review, permitting, inspection & record mapping services	Ensure timely mapping of all donated infrastructure, easements & other local program assets in GIS		
		Complete historical easement digitization process	
Deliver GIS system services		<p>Identify data gaps; develop GIS datasets & metadata to support data-driven decision-making</p> <p>Develop digital cartographic maps, web maps, story maps, visualizations & applications for internal & external stakeholders</p>	
Catalyze collaboration for transformative research		Develop digital twin concept & foundational data management systems in collaboration with DS & Operations partners, including WRRD, FO, RES & WET	
Coordinate project & program development with internal work groups		Socialize centralized GIS model & channels for collaboration & communication	
Cultivate employee engagement		Establish & monitor PDPs for each team member & continue to support successful onboarding	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Update, upgrade & monitor GIS systems	Integrate Datadog in ArcGIS for better performance monitoring & logging	Integrate Datadog in ArcGIS for better performance monitoring & logging on external-based processes	
	Implement technical debt process to refine GIS-based nightly routines		
	Implement ArcGIS monitor system for enterprise portal		
	Plan trace & utility network migration phases across next two years	Work with consultant to perform data analysis & migration from geometric shape network to utility network	
		Complete the trace network migration for stream-based network	
		Continue implementing an equity mapping strategy	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Deliver GIS system services	Service level	Number of GIS work requests completed	TBD	185	195	250
	Service level	Number of ArcGIS users per day	80		76	80
	Service level	Number of GIS web services	2,400		2,364	2,400
	Service level	Number of GIS integrations	1,450		1,418	1,450
Cultivate employee engagement	Service level	Percentage of staff that have documented & approved PDPs	100%	40%	100%	100%



FY24-26



Information Technology Business Applications

The IT Business Applications program performs application development and deployment, software system maintenance, workflow automation, business intelligence, system integrations, and data services to CWS. The program prioritizes work that aligns with organizational key strategic objectives. The IT Applications team is composed of developers (Software Engineers) and data professionals (Database Administrators, Data Warehouse Engineer, Data Analyst). The team is committed to implementing and maintaining modern technology solutions that support the utility of the future with a secure and reliable tool chain.

Goal

- Foster collaborative relationships while providing digital innovation and solutions for CWS
- Deliver timely, efficient, and effective services that meet the needs of CWS employees and customers
- Continue to modernize and innovate while reducing technical debt
- Enable the effective use of data for decision making and business processes
- Prioritize, plan, and manage projects that are most important to CWS

Advantage

- A reliable, resilient, and secure digital foundation
- Secure and scalable services (including applications, integrations, and processes)
- An understanding of business processes, partnered with IT expertise, that ensures delivery of effective applications, dependable systems, and meaningful data
- Manages projects to ensure work that addresses the IT needs of CWS is prioritized, managed, and completed effectively
- Up-to-date knowledge of technological security risks and threats and the ability to mitigate them quickly

Scope

- CWS workforce
- IT applications and integrations

Value - Added

- Improve employee collaboration and productivity through digital tools
- Evaluate, provide, and support software and hardware solutions to support business needs
- Remain up to date on IT industry advancements and how they can be applied to CWS
- Provide technical foundation and processes for data that is clean, accessible, and usable

CWS Values

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Abbreviations

AI: artificial intelligence
Board: CWS Board of Directors
CI/CD: continuous improvement/continuous delivery
DS: Digital Solutions
EBS: E-Business Suite
ERP: enterprise resource planning
GIS: geographic information system
IoT: Internet of Things
IT: information technology
KPI: key performance indicators
LIMS: laboratory information management system

Definitions

Technical debt: also known as tech debt or code debt, is the cost of future rework that results from prioritizing speed over long-term design in software development.



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Build data management framework & systems to support data-driven decision making			Explore feasibility of Enterprise Command Center in Oracle EBS
	Create & maintain data structures suitable for business intelligence & AI applications		
	Commence multiyear data governance & data management project	Data governance & management project, phase 1	Implement data governance & management phase 1 recommendations
			Data governance & management project, phase 2
	Develop data governance policy	Approve data governance & management policy	Establish data governance committees & objectives
		Research standards for data services	Roll out dashboards & self-service standards
	Gather requirements for new data warehouse	Build data system & observability pipeline for data warehouse infrastructure	Begin to convert systems into data warehouse architecture
		Build Azure pipeline	
Modernize & innovate	Update & migrate organization applications to SaaS technology		
			Gather requirements for ERP & budgeting replacement
	Modernize & reduce technical debt		
		Scope document management	Gather requirements for document management
		Identify LIMS integrations, pipelines & data classifications	LIMS procurement process
			Begin LIMS implementation
		Gather requirements for Board materials management system	Implement system for Board materials management
		Begin to plan trace & utility network migration phases across next two year	Hire consultant to support data analysis & migration from geometric network
	Approve data logger pilot that supports high level programming language	Begin to develop water quality stations for stream & natural treatment system with data logger	Deploy stations & pilot for season

Objective	Initiatives		
	FY 24	FY 25	FY 26
Modernize & innovate	Define scope of SharePoint migration	Gather requirements for contract management system	Select & implement contract management system
		Gather requirements for legal case management system	Select & implement legal case management
		Begin migration of initial SharePoint components	Continue SharePoint migration
		Gather requirements for employee engagement portal, phase 1	Implement employee engagement portal phase 1
			Gather requirements for employee engagement portal, phase 2
		Evaluate Oracle EBS migration to Linux	Implement EBS on Linux
Workforce development	Assess gaps in current opportunities for career development	Implement changes to facilitate opportunities for career development	
	IT Applications employee skill development & training		
Documentation	Determine gaps in application catalog for documentation & source control	Begin to expand documentation & repository	Continue to expand documentation & repository
Customer service		Deploy survey for customer service feedback	Act on customer service feedback
Enhance IT governance	Conduct annual review of all policies related to IT applications		
	Draft & implement new policies		
		Create approved software catalog	Add additional detail to approved software catalog
		Provide tools to end users for guidelines on programming languages, software & process	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Modernize & innovate	Performance measure	CI/CD pipeline & full system monitoring	100%	N/A	5%	25%
Customer Service	Performance measure	Monthly velocity ratio	75%	Not tracked	60%	50%
	Service level	Average time to complete (all requests)	15 days	Not tracked	19.1 days	19 days
Modernize & innovate	Performance measure	Ratio of break fix:service request:project work	20%:50%:30%	Not tracked	25%:65%:10%	25%:65%:10%
	Performance measure	Application portfolio growth	5%	Establish baseline	23%	20%
	Performance measure	Data objects changed	5,000	11,900	12,000	10,000
	Performance measure	Development (code base) growth	5%	Establish baseline	17%	15%
Documentation	Performance measure	Application catalog completeness	100%	0%	25%	100%
	Performance measure	Documentation & system architecture diagram completion	100%	Not tracked	10%	25%



FY24-26



Information Technology Client Services

The new IT Client Services program is the front-line support for the technological needs of all CWS employees. As the “face of Digital Solutions,” IT Client Services offers superb customer service through service desk operations and business systems analysis work. The Service Desk supports client devices and services, including printers, laptops and desktops, conference room audio/visual, IoT devices (cameras, lab equipment, etc.), and general technical support. The Business Systems Analysts serve as software administrators and liaisons with application users. They instruct users on application functions, log changes, problems, and enhancement requests, and translate business processes, workflow, and data requirements into functional specifications.

Goal

- Timely and effective technology support to meet the needs of CWS employees

Advantage

- Skilled team with depth and breadth of knowledge across CWS technology systems and devices
- Ready to help

Scope

- CWS departments and employees

Value - Added

- Increased focus on quality of technical customer service to employees
- Alignment of skill sets with an end-user focus
- Effective triage of requests, enabling a more efficient department

Abbreviations

IoT: Internet of Things
IT: information technology
SLA: service level agreement
SOP: standard operating procedure

CWS Values

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PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Customer service		Deploy survey for customer service feedback	Act on customer service feedback
		Enable reporting on ticket satisfaction	
Workforce development		Assess gaps & implement changes to facilitate opportunities for career development	
			Employee skill development & training
Equipment replacement & renewal		Conduct annual device refresh cycle	
Establish quality control processes			Create program SLAs for requests & incidents
			Begin monitoring performance against SLAs
			Create program SOPs
Build IT Client Services program			Hire IT Client Services Manager
			Move IT Technicians & Business Systems Analysts into new program
			Socialize program capabilities & services to CWS employees

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Customer service	Service level	Help Desk phone answer rate	95%	89.46%	90%	90%
	Service level	Tickets resolved per month	95%	93.6%	95%	95%
	Service level	Time to close – critical priority	4hrs	12.84 days	2 days	2 days
	Service level	Time to close – high priority	1 day	7.39 days	3.89 days	3 days
	Service level	Time to close – medium priority	2 days	7.38 days	3.76 days	3 days
	Service level	Time to close – low priority	5 days	11.48 days	7.21 days	6 days
	Service level	IT Tech staffing ratio	70:1	160:1	160:1	160:1
Regular equipment replacement & renewal	Service level	End-user equipment deployed	180	189	170	185



FY24-26



Information Technology Infrastructure

The IT Infrastructure program provides technology services in two primary areas: network and server. The network team designs and maintains the CWS network, including communications between all sites, WiFi, internet access, and manages the phone system. The server team is responsible for implementing and managing server infrastructure, digital file storage and physical storage hardware, maintaining CWS data centers, system administration, backups, and providing infrastructure administration and support to the operational technology team. Both teams work together to design, develop, deploy, and maintain new hardware and software solutions for CWS.

Goal

- Foster collaborative relationships to aid in solving CWS challenges with innovative technology solutions
- Provide timely, efficient, and effective services that meet the needs of CWS employees and customers
- Reduce technical debt (work required to fix issues caused by prioritizing speed over quality, or old, inefficient solutions that need to be updated or changed) through modernization and adherence to best practices
- Provide a positive user experience across technology landscape
- Mitigate and eliminate cyber risks and organizational technical liabilities
- Provide secure and reliable connectivity for CWS employees
- Prioritize, plan, and manage projects that are most important to CWS
- Effectively share technical knowledge through onboarding, education, and training

Advantage

- A reliable, resilient, and secure digital foundation by ensuring business continuity and essential IT functions are a top priority at all times
- An understanding of how IT infrastructure enables and impacts business processes and operations
- Up-to-date knowledge of technology security risks and proactive work to mitigate threats

Scope

- Information technology services for CWS workforce, partners, and customers

Value - Added

- Improve employee collaboration and productivity through digital tools
- Evaluate, provide, and support software and hardware solutions to support business needs
- Remain up to date on IT industry advancements and how they can be applied to CWS
- Build digital resilience and agility through continued capital and operating investments
- Provide technical foundation and processes for data that is clean, accessible, and usable
- Provide network connectivity for CWS employees to internal and external resources that is secure and stable

CWS Values

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Abbreviations

DB: database
DS: Digital Solutions
CIS: Center for Internet Security
CISA: Cybersecurity and Infrastructure Security Agency
CoLo: Colocated data center
GPU: graphics processing unit
IoT: Internet of Things
IT: information technology
KB: knowledge base
OT: operational technology
PCI: payment card industry
SCADA: supervisory control and data acquisition systems
SOP: standard operating procedure

Definitions

Technical debt: also known as tech debt or code debt, is the cost of future rework that results from prioritizing speed over long-term design in software development.



PE Strength & Opportunities



Goal Sharing measure

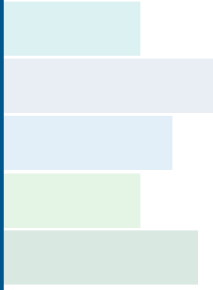
Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Support capabilities & maturity of cybersecurity program	Design new SCADA network	Implement SCADA network changes	Implement SCADA network changes
		Enhance firewall rule sets for SCADA	
	Mitigate cybersecurity threats identified by cybersecurity program		
Modernize & innovate	Modernize & reduce technical debt		
			Implement new phone system
		Implement new dark fiber connections	
		Set up initial network at CWS Central	CWS Central build-out, including new network connections. Conference rooms & offices
		Modernize mobile devices & mobile apps	
		Mobile network access for trucks	
		Desktop virtualization	
		Deploy server to support GPU-intensive modeling & processes	
		Rebuild WiFi networks	
		Roll out upgrades to Windows 11 & Server 22	
		Migrate virtualization platform	
		Research & plan changes to internet design	Implement new internet design
			Expand use of ticketing system for change management
Workforce development	Assess gaps in current opportunities for career development	Implement changes to facilitate opportunities for career development	Continue to assess gaps & implement changes
	IT Applications employee skill development & training		
Equipment replacement & renewal	Conduct annual device refresh cycle		
Documentation		Create, review & align SOPs	
		Develop additional KB articles & centralize location	

Objective	Initiatives		
	FY 24	FY 25	FY 26
System availability & disaster recovery	Migrate data center to CoLo		
	Manage & continuously improve backup processes		
			Move backup data center to new location
Enhance IT governance	Conduct annual review of all policies related to IT Infrastructure		
	Conduct internal review of internal resource usage & utilization		
		Formalize & implement change management process	Integrate change management process into ticketing system
	Manage, test & continuously improve emergency response & disaster recovery plans		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Target FY 25	Target FY 26
Disaster recovery	Performance measure	Production backup coverage	Meet internal standards [redacted]	Meet internal standards [redacted]	Meet internal standards [redacted]	Meet internal standards [redacted]
	Performance measure	Successful test restores	Meet internal standards [redacted]	Meet internal standards [redacted]	Meet internal standards [redacted]	Meet internal standards [redacted]
System availability	Service Level	Server uptime	99.9%	99.11%	99.9%	99.9%
	Service Level	Network uptime	99.9%	99%	99.9%	99.9%



Finance & Accounting Department



FY24-26

FA

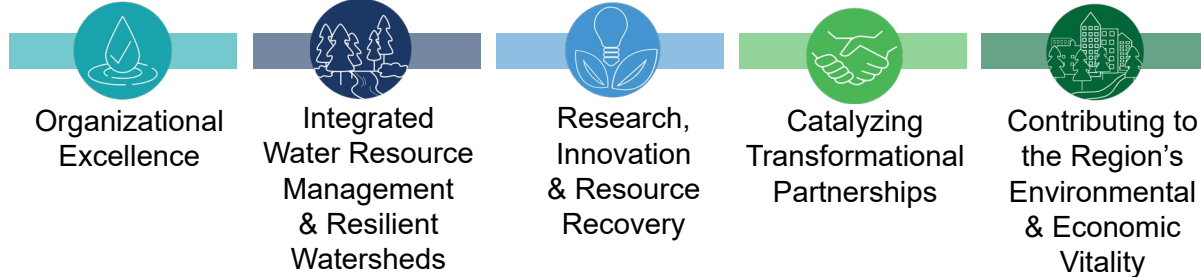
Finance & Accounting

Full-time employees: 19

Departmental operating budget: \$5,723,900

Finance & Accounting is responsible for providing essential financial services such as strategic financial planning, financial accounting and reporting, and developing and administering the budget. The department ensures compliance with CWS policy and federal regulations by accurately and promptly processing financial transactions and by developing and maintaining CWS financial policies and procedures. The department's services include CWS payroll, accounts receivable, accounts payable, the annual budget and capital improvement program, financial reporting, treasury, financial systems management, debt management, and utility billing. In addition, the department manages bond issuance and debt management, cost of services analysis, setting rates and fees, and financial forecasting.

Key Strategic Outcomes (KSO):



Abbreviations

CIP: Capital Improvement Program













PE Strength & Opportunities



Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Percentage of operating budget	4.0%	3.9%	4.0%	4.0%
Write off uncollectable rates & fees	.44% of revenue billed	.44% of revenue billed	.44% of revenue billed	.44% of revenue billed
Number of audit findings	0	1	0	0

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Revenue (percentage actual to budget)	103%	96%	103%	103%
O&M expenditures (percentage actual to budget)	90%	84%	90%	90%
Capital expenditures (percentage actual to budget)	85%	84%	85%	85%
Bond rating	AAA/Aa1	AAA/Aa1	AAA/Aa1	AAA/Aa1
Rates (comparison)	4% increase	\$62.50 (4% increase)	\$65.00 (4% increase)	\$67.60 (4% increase)
Total operating ratio	49.8	60.6	60.6	60.6
Total quick ratio	2.2	9.79	9.79	9.79
Debt coverage ratio	3.2	7.36	7.00	7.00
Days cash on hand	1,600	1,282	1,300	1,300
Asset condition	40.0	41.0	41.0	41.0
Sanitary sewer operating ratio	49.8	58.8	59.0	59.0
Sanitary sewer debt ratio	20.9	16.6	17.0	17.0
Surface water management operating ratio	49.8	74.4	74.0	74.0

Objectives	Initiative Statements	KSO
Develop & maintain CWS financial policies & procedures	Enhance the overall financial health of CWS by implementing strong financial policies, procedures & internal controls. Aspire to establish a resilient framework for managing financial resources, ensuring compliance with regulations & promoting transparency.	
Provide CWS payroll services	Provide exceptional payroll services by establishing streamlined, efficient & technologically advanced payroll systems that ensure timely & accurate compensation for our employees in compliance with regulatory & contract requirements.	
Provide accounts receivable services	Optimize accounts receivable process to enhance cash flow, reduce outstanding receivables & streamline billing process to ensure accuracy & completeness of amounts billed.	
Provide accounts payable services	Optimize payment process by strengthening vendor relationships & establishing streamlined, efficient & technologically advanced accounts payable systems that ensure timely & accurate payments to our vendors in compliance with CWS procurement policies.	
Provide annual budget & CIP services	Committed to transparency, accountability & fiscal responsibility. Deliver annual budgets & CIPs that align with CWS strategic plans, allocate resources to meet operational & capital needs, provide financial resiliency & ensure sustainable growth.	
Provide financial reporting services	Committed to transparency, accuracy & strategic financial management. Deliver timely, comprehensive & insightful financial reports that empower CWS to make informed decisions, meet regulatory requirements & enhance stakeholder confidence.	
Provide Treasury services	Strengthen CWS' financial position by ensuring adequate liquidity & mitigating risk of loss on investments while optimizing investment returns in compliance with the CWS' investment policy.	
Provide financial systems management services	Provide exceptional support in analyzing, designing & implementing financial systems & ongoing support & optimization for a robust financial system. Elevate operational efficiency, embrace technology advancements & promote responsible financial practices.	
Provide debt management services	Strengthen CWS' financial sustainability & ensure access to capital markets to finance operational infrastructure at the lowest possible cost of capital. Deliver timely repayment of debt, maintain strong debt coverage ratios & ensure regulatory compliance.	
Provide utility billing services	Provide exceptional customer service with user-friendly, transparent & technologically advanced utility billing experience. Optimize billing & collection process to enhance cash flow, reduce outstanding receivables & streamline billing process to ensure accuracy & completeness of amounts billed.	

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Finance & Accounting

Finance & Accounting is responsible for providing essential financial services such as strategic financial planning, financial accounting and reporting, and budget development and administration. The program ensures compliance with CWS policy and federal regulations by accurate and promptly processing financial transactions and by developing and maintaining CWS financial policies and procedures. The program's services include CWS payroll, accounts receivable, accounts payable, annual budget and capital improvement program, financial reporting, treasury, financial systems management, debt management, and utility billing. In addition, the program manages bond issuance and debt management, cost of services analysis, setting rates and fees, and financial forecasting.

Goal

- Provide timely, efficient, and effective financial services that meet the needs of stakeholders
- 100% financial compliance

Advantage

- Adherence to ongoing education and training to stay current with regulatory requirements
- Dedication to delivering exceptional customer service
- Strong sense of ownership and pride in work, providing support and assistance to teams
- Proven track record of producing high-quality audit records and opinions, with no budget violations

Scope

- Fiduciary duty of CWS funds

Value - Added

- Ensuring compliance with state and federal regulations for reporting, budgeting, and payroll tax
- Overseeing budget process, utility billing, and payroll management
- Offering comprehensive financial reporting and accounting services
- Developing and implementing strategic financial and budget planning
- Building strong partnerships and effective communication with agencies and partner cities
- Managing treasury and debt services
- Establishing and maintaining internal controls to ensure the reliability and accuracy of financial reports and transactions

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Abbreviations

ACFR: Annual Comprehensive Financial Report
CCE: Communications & Community Engagement
CIP: Capital Improvement Program
CIS: customer information system
COLA: cost-of-living adjustment
COSS: cost of services study
CWIC: Clean Water Insurance Company
DS: Digital Solutions
EIS: Enterprise Integrated Solutions
EMMA: Electronic Municipal Market Access
FOG: fats, oils, and grease
FTE: full-time equivalent or full-time employee
GAAP: generally accepted accounting principles
GASB: Governmental Accounting Standards Board
GFOA: Government Finance Officers Association
GPA: Government Portfolio Advisors
HR: Human Resources
LID: Local Improvement Districts
LSI: local sewer improvement
MOU: memorandum of understanding
OSF: Open Smart Flex
PM: Project Manager
RFP: request for proposals
SAGE: Strategic Advisory Group to the Executive
SDC: System Development Charge
SDEPM: Strategy Development & Enterprise Performance Management
SWM: surface water management
TVWD: Tualatin Valley Water District
W-2: Wage and Tax Statement
W-4: Employee's Withholding Certificate



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Develop & maintain CWS financial policies and procedures	Prioritize developing new policies & procedures	Develop new policies & procedures from prioritization list	
	Prioritize the updating & modification of existing policies & procedures	Modify existing policies & procedures from prioritization list	
	Create & update desk manuals to inform staff on current practices & procedures		
		Plan & start to develop capital asset management & planning policies	
Provide VWS payroll services	Deploy Oregon Paid Leave Tax & benefits		
		Develop & implement new PEBB insurance benefit elements for nonrepresented employees	
		Partner with HR to develop & implement new 401a plan	
	Monitor biweekly payroll process		
	Train staff supervisors on timecard approval responsibility		
	Monitor quarterly reporting of federal & state tax withholding process		
	Monitor annual W-2 federal tax process		
	Implemented & deployed employee self-service direct deposit and W-4 information in Oracle		
Provide accounts receivable services	Monitor daily cash receipt & posting to Oracle process		
	Monitor monthly industrial & other billing process (e.g. septic, FOG)		
	Develop billing & collection training for project managers		
	Monitor monthly billing process with the City of Portland		
	Administer vendor software to provide LID LSI financed assessment billing		
Provide accounts payable services		Continue review of electronic invoice processing software	
		Partner with Administrative Services & Procurement to conduct onboarding & refresher training	
	Monitor annual 1099 reporting process		
	Monitor invoice & payment process		
	Monitor approval & coding process		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Provide annual budget & Capital Improvement Program services	Manage & monitor annual budget & CIP development process		
	Partner with HR & SAGE to administer quarterly interim decision process (e.g., FTE adds & reclassifications, chemicals)		
	Partner with DS & SDEPM to conduct a feasibility study for replacing ProSight & Oracle		
	Improve forecasting, reporting and scenario planning and analysis using Questica		
	Administer & monitor enterprise budget review process		
	Plan & implement integration of strategy development with enterprise budget review process		
	Monitor departmental & program realignments as part of budget processes		
			Partner with DS to implement Questica Saas product
			Partner with DS & Capital Planning on CIP process & reporting enhancements
			Partner with Capital Planning to implement GFOA CIP/asset management best practices
Provide financial reporting services	Monitor implementation of GASB Statement No. 96 - Subscription-Based Information Technology Arrangements		
		Implement GASB Statement No. 101 – Compensated Absences	
	Evaluate key metrics & statistical trending in ACFR statistical section		
	Implement ACFR reporting software		
	Plan process for improving delivery of accurate & timely annual financial reporting	Implement modifications to enterprise year-end closing process with SAGE sponsorship & enforceable deadlines	
	Plan process for improving capital asset management	Implement modifications to capital asset management process including increase in capitalization threshold	Implement modifications to capital asset management process including classification, useful life, ownership & capital closeout
	Hire & onboard for capital asset accountant position		

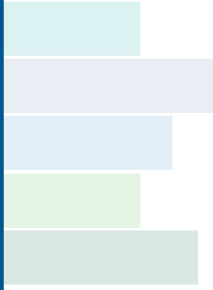
Objective	Initiatives		
	FY 24	FY 25	FY 26
Provide financial reporting services	Implement top priority efficiency measures to improve daily & monthly reconciliations	Monitor daily & monthly reconciliations	
	Meet with auditors off cycle to improve financial audit process		
	Plan for fund structure change for sani & storm services, internal service funds & segregation of regional & local services		
	Extend audit services for one additional year	Perform RFP for financial audit services & award contract	
	Plan for development of CWS Audit Committee including bylaws	Establish CWS Audit Committee & appoint members	
		Draft & submit Technical Inquiry to GASB for reporting entity determination	
		Partner with Legal & Washington County to draft & adopt an MOU defining the financial relationship between both parties	
Provide Treasury services	Monitor cash flow management		
	Improve cash flow management including portfolio decision-making & liquidity needs to meet obligations		
	Hire & onboard for the accountant treasury position		
		Develop cash flow planning process	Maintain cash flow planning process
	Set up Development Services permit application & electronic payment system	Monitor E-payment system banking interface	
		Create enterprise internal control documents for treasury and investing	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Provide Treasury services	Extend existing banking services contract for 1 year	Complete RFP for banking services or piggyback on existing contract Renew or extend contracts with GPA & Zion	
Provide financial systems management services	Partner with DS to build, upgrade & test integration of Oracle software		
	Train staff on Oracle software upgrades		
	Develop Oracle Enterprise Integrated Solutions (EIS) reporting capability		
	Testing & Implementation of Open Smart Flex (OSF) Phase I – Utility Billing System – Release 43	Partner with CCE & Development Services on OSF Phase II – Monthly billing, Billing interface & AMANDA integration	
	Implementation of billing regional & local rates separately		
		Test & deploy Open SmartFlex Releases 47, 48, 49 & 50	
	Partner with HR on union holiday & agreement & COLA adjustments		
			Partner with DS for SharePoint migration to another tool Partner with DS on data warehouse for Open utility billing & Amanda customer reports Partner with DS on conversion from Oracle EIS to Splash BI reporting
Provide debt management services	Report & file via Electronic Municipal Market Access (EMMA), including posting of ACFR & disclosure of qualifying events		
	Prepare & monitor debt schedules & future debt issuance		
	Administer debt principal & interest payments		
		Identify investor reporting information to include on CWS website	
		Evaluate issuance of \$75 million bonds	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Provide utility billing services	Continue to implement functionality in the new OSF CIS billing system		
	Monitor & train staff on OSF CIS billing system		
	Monitor collections activity		
	Deploy regional & local rate billing in the new OSF CIS billing system	Draft new intergovernmental agreement with TVWD for utility billing services	
		Contract with consultant to perform cost allocation study for utility billing services with TVWD	
Provide strategic financial planning			Update & Maintain COSS financial forecast
			Use COSS to formulate new utility billing rates
			Partner with Capital Planning on developing SDC methodology

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Provide financial reporting services	Performance measure	Number of financial audit findings	0	1	0	0
	Performance measure	Coverage ratio	3.2	7.36	7.0	7.0
	Performance measure	Bond rating	AAA/Aa1	AAA/Aa1	AAA/Aa1	AAA/Aa1
	Performance measure	Rates (comparison)	(increase 4%)	\$60.50 (increase 4%)	\$65.00 (increase 4%)	\$67.60 (increase 4%)
	Performance measure	Total operating ratio	49.8	60.6	60.6	60.6
	Performance measure	Total quick ratio	2.2	9.79	9.79	9.79
	Performance measure	Days cash on hand	1,600	1,282	1,300	1,300
	Performance measure	Asset condition	40.0	41.0	41.0	41.0
	Performance measure	Senior debt services coverage	3.2	7.36	7.0	7.0
	Performance measure	Sanitary sewer operating ratio	49.8	58.8	59.0	59.0
	Performance measure	Sanitary sewer debt ratio	20.9	16.6	17.0	17.0
	Performance measure	Surface water management operating ratio	49.8	74.4	74.4	74.4



Human Resources Department



FY24-26

HR

Human Resources

Full-time employees: 10

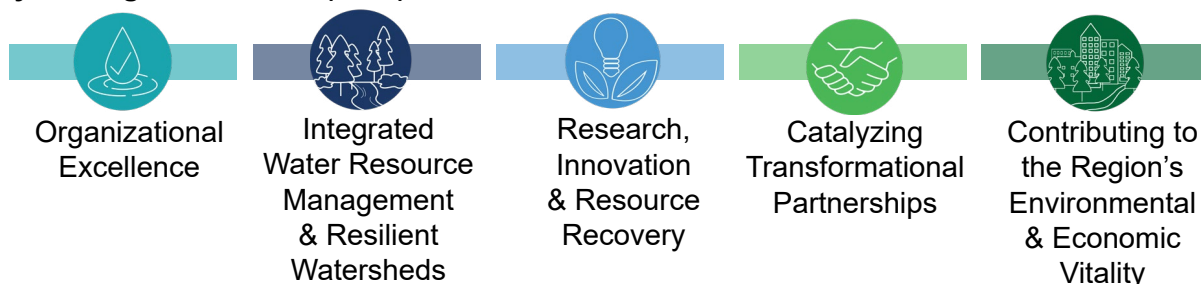
Departmental operating budget: \$2,889,100

The Human Resources department's mission is to provide a connection between management and employees to enhance morale and productivity. Human Resources cultivates a welcoming environment for all staff to understand the services provided and seek trustworthy information to build professional and personal successes throughout their career with CWS.

The HR team collaborates with stakeholders to plan and develop streamlined business processes and employee-centered programs that allow Clean Water Services to remain inclusive, efficient, and innovative while promoting a team-based, collaborative organization that supports continual learning and employee well-being. HR ensures compliance with labor laws, maintains employee records, and handles confidential sensitive information.

The department's service areas include human resources compliance and analytics, total rewards, talent management, organizational development and learning, employee performance management, and labor relations.

Key Strategic Outcomes (KSO):



Abbreviations

HR: Human Resources








PE Strength & Opportunities



Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
# of policies reviewed and updated	8	3	8	8
# of All Leaders meetings hosted	3	3	3	3
# of supervisor training sessions hosted	10	9	6	10

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Average time to fill vacant positions	90	66	90	90
# of employee performance reviews completed	410	393	400	430
# of employee midyear check-ins completed	410	344	400	430

Objective	Objective Statement	KSO
Timely, efficient & effective services	Develop a request intake & tracking system to establish monitoring of service delivery	
Consistent services	Complete standard documents, including policies, procedures, benefits & retirement information, job classifications & pay plans & make them accessible	
High-quality workforce	Continually monitor & update performance management processes to improve clarity on expectations on individual performances	
	Innovate on all aspects of the recruitment process to ensure competitiveness in the labor market	
	Continually monitor & update compensation & benefits packages within CWS financial constraints to ensure competitiveness in the labor market	



FY24-26



Human Resources

Through strategic partnerships and collaboration, Human Resources attracts, develops, and retains a high performing, inclusive, and diverse workforce and fosters a healthy, safe, well-equipped, and productive work environment for employees to maximize their individual potential.

Human Resources is responsible for planning, developing, and implementing diverse employee processes and programs that allow Clean Water Services to remain inclusive, efficient, and innovative, while promoting collaboration, continual learning, and employee well-being. Responsibilities include benefits and wellness; managing employee relations; recruitment, selection, and onboarding; equity, diversity, and inclusion; classification and compensation; labor relations including contract interpretation and dispute resolution; employee training and development; performance evaluations; reporting and analytics; administering human resources policies and procedures; and compliance with state and federal employment laws.

Goal

- Timely, efficient, and effective services that meet the needs of our stakeholders
- Provide consistent customer service that meets the needs of the workforce
- Partner with departments to hire, compensate, support, and create a workforce dedicated to delivering high quality services

Advantage

- Team of professionals with expert knowledge who help ethically balance compliance and CWS needs
- Cohesive, collaborative, and supportive team that demonstrates compassion and empathy toward employees
- Excellent active listening skills, creative problem-solvers, trustworthy, and committed to upholding CWS values
- Team creates a welcoming and positive work environment that fosters dedication and hard work

Scope

- People

Value - Added

- Support leadership and employees to drive strategy and navigate laws, policies, and best practices
- Guide and serve as a resource to employees and leadership throughout their careers with CWS
- Foster and support an inclusive and diverse culture to promote engagement and a positive employee experience

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

BIPOC: Black, Indigenous, and people of color
CCE: Communications & Community Engagement
CEL: Culture, Equity & Learning
CWIC: Clean Water Insurance Company
DS: Digital Solutions
EAC: Employee Advisory Council
ERG: employee resource group
HR: Human Resources
LMG: Labor Management Group
LOA: leave of absence
PEBB: Public Employees' Benefit Board
RFIP: request for informal proposals
RFP: request for proposals
SAGE: Strategic Advisory Group to the Executive
SME: subject matter expert
WRRD: Water Resources Recovery Operations & Services department



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
HR COMPLIANCE & ANALYTICS			
Oversee & implement HR compliance requirement & process changes	Audit & update licensure, certification & tuition tracking & document processing	Implement improved process to track license, certification & tuition documentation	Monitor, track, & maintain up-to-date license, certification & tuition documentation
		Explore electronic record-keeping options & begin storing electronically	Continue electronic record-keeping storage processes & procedures
	Review, update & communicate CWS employee policies for changes & updates in accordance with SAGE & Board approval & within state & federal laws		
	Collaborate with Risk & Insurance Management, Legal, Finance & Accounting & CWIC board on state & federal compliance		
	Implement HR dashboard	Monitor & implement HR dashboard. Research current technologies for automation	Build & implement dashboard automation for recruitment
	Continually review & update HR operations & programs based on compliance changes		
	Update “A Place to Learn, Grow & Thrive” site on SharePoint		
Leave of absences	Paid Leave Oregon implementation, communication & administration	Paid Leave Oregon administration & claims management	
		LOA training	
Provide continual communication updates on HR topics	Keep employees informed through HR communication channels		
	Partner with CCE on communication plans for HR initiatives & implementations		
TOTAL REWARDS			
Manage employee benefit offerings	Summarize & review employee benefit survey data	Participate in Represented benefits audit with external auditor	Conduct a nonrepresented employee benefit survey
Implement new benefit provider & broker	Upon approval, implement new benefit provider	Implement new nonrepresented benefits	
	Prepare & submit Informal RFP		
Manage HR benefit Oracle training	Provide HR benefits staff refresher training on Oracle entry procedures & processes	Create, test & implement new benefit provider options	Audit & review benefit entries on Oracle entry procedures & processes

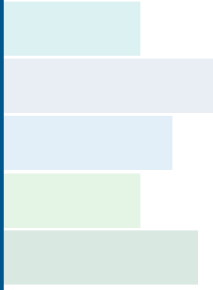
Objective	Initiatives		
	FY 24	FY 25	FY 26
Manage daily & annual benefit operations	Partner with Finance, Risk & CWIC to conduct reporting, auditing & testing		
	Manage annual open enrollment		
		Provide education & support to nonrepresented employees with the PEBB online portal	
	Provide continued benefit administration & support services		
Benefit process improvement	Monitor & improve provider billing	Monitor & implement PEBB provider billing	
		Review, create & implement internal controls for billing processes for represented employees	Review & maintain internal controls for billing processes for represented employees
	Continue partnership with Finance to create & implement improved processes		
Review & implement new wellness program	Review & analyze current wellness options & strategize on next steps	Research & develop a wellness strategy, present findings to SAGE, present benchmark data	Collect & present implementation research for wellness program
		Communicate wellness program	Provide employees with information & resources for well-being
Develop a continual compensation review & study program for both represented & nonrepresented positions			Conduct represented position market study
	Conduct nonrepresented position market study		
	Manage CWS internal equity, evaluate salaries & perform daily compensation operations		
		Conduct executive compensation market study	
Develop & implement new pay philosophy	Develop & implement new pay philosophy, including pay practices & policies for represented employees & all-CWS training	Research, review & update nonrepresented pay philosophy & policies	
		Initiate a pay equity study for nonrepresented employees	Complete a pay equity study for nonrepresented employees
Complete compensation surveys & updates	Respond & participate in external class & comp surveys, including updating the compensation survey library		
Job description evaluation	Review, create & update job descriptions & implement standard process		Review, create & update job descriptions

Objective	Initiatives		
	FY 24	FY 25	FY 26
Manage retirement program & implementation	Administer CWS retirement program & provide employee retirement services	Transfer plan administrator role to Chief Financial Officer	
		Communicate & assist employees with retirement services	
		Set up & implement 401a retirement plan	Review retirement plan document & make necessary recommendations & updates
TALENT MANAGEMENT			
Manage recruitment & selection	Manage CWS vacancies & position control		
		Survey supervisors on recruitment & selection process	
Applicant tracking system - NeoGov		Update Onboarding portal & review process & procedures	Research & implement NeoGov offboarding process & procedures & hiring manager SME review
	Review & update panel prep information on bias & interview process	Implement NeoGov interview self-scheduling & update disposition codes	
		Research NeoGov options for internal job posting site & dashboard opportunities	
Implement apprenticeship programs	Partner & review opportunities for expanding apprenticeship program	Continue & evaluate apprenticeship program	Partner & review opportunities for expanding apprenticeship program
Retention strategies	Review recognition program for retention improvements		Review recognition program for retention improvements
ORGANIZATIONAL DEVELOPMENT & LEARNING			
Partner with CEL on learning initiatives & engagement	Partner with CEL on recruitment, outreach & partnership initiatives		
	Partner with CEL on Gallup implementation & engagement		
Implement supervisor training	Create content library & implement supervisor training program	Expand & deliver supervisor training offerings	Monitor, update & deliver supervisor training offerings
EAC	Provide continued support for ERGs & EAC		
Implement bilingual pay program	Implement bilingual pay program	Administer & maintain bilingual pay program	

Objective	Initiatives		
	FY 24	FY 25	FY 26
EMPLOYEE PERFORMANCE MANAGEMENT & LABOR RELATIONS			
Manage employee relations	Manage employee & supervisor relations, resolutions & development of training-based outcomes		
Implement new performance management system	Evaluate midyear evaluation process	Conduct midyear evaluation process	
	Annual review of CWS organizational & behavioral competencies		
	Implement nonrepresented employee performance review in NeoGov	Review annual performance review process with supervisors for feedback & make recommendations & updates	Administer & maintain employee annual review process
Collective Bargaining Agreement			CWS & Teamsters Local 223 bargain labor agreement
Implement labor agreement	Provide contract interpretation & maintain labor relations		
Initiative to foster communication with HR & union	Host quarterly LMG meetings to increase communication		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Talent management	Service level	Number of employees supported	460	454	488	490
	Service level	Number of vacancies	48	48	48	30
	Service level	Number of active recruitments	24	30	24	15
	Performance measure	Authorized positions filled	80	102	80	60
	Performance measure	Separations	48	46	48	49
Organizational development and learning	Performance measure	Workforce diversity (% of BIPOC employees)	25	18	20	22
	Performance measure	Workforce diversity (% of female and nonbinary employees)	35	32	34	36



Legal & Compliance Services Department

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Internal Compliance & Cybersecurity

Internal Compliance & Cybersecurity investigates and determines whether CWS is complying with applicable laws, regulations, internal policies, and procedures. The team helps CWS achieve and maintain compliance and helps departments make compliance business processes more efficient and effective. The team also protects assets and identities, plans for future requirements, mitigates cyber risks, and ensures compliance with cybersecurity regulations in both Information Technology (IT) and Operational Technology (OT) environments. Before Fiscal Year 2025-26, cybersecurity work was reflected in the Digital Solutions roadmaps.

Goal

Internal Compliance

- Ensure compliance with applicable laws, regulations, and internal policies.
- Promote efficient controls.
- Achieve compliance with all applicable laws, regulations, internal policies, and procedures.
- Meet new compliance requirements promptly by anticipating changes and planning accordingly.
- Use efficient and effective business processes to achieve compliance.
- Ensure staff understand compliance requirements and responsibilities.

Cybersecurity

- Create a technologically resilient CWS now and into the future.
- Ensure CWS can:
 - Identify current cybersecurity risks and document them for remediation.
 - Protect all assets and further safeguard CWS critical assets.
 - Detect cybersecurity attacks or compromises.
 - Respond to detected cyber-attacks or compromises effectively.
 - Recover from cyber-attacks effectively.
- Educate CWS workforce members on cybersecurity responsibilities.

Advantage

- Avoiding permit and other regulatory violations.
- A high level of goodwill with regulatory agencies.
- CWS staff members understand and appreciate where compliance fits into broader CWS operations.
- A secure digital footprint that scales effectively as IT and OT continue to grow.
- A robust cybersecurity technology portfolio to effectively plan for current and future needs.
- CWS workforce members are trained to understand their cybersecurity responsibilities and become more situationally aware of cybersecurity threats.
- Resilient IT & OT systems.

Scope

- CWS departments and workforce members
- CWS technology – IT/OT
- All legal, regulatory, and internal policy requirements CWS must comply with

Value - Added

- Programmatic and objective means of determining compliance.
- Meeting evolving compliance requirements is a team effort involving multiple disciplines
- Ability to respond quickly to compliance-related issues.
- Confidential hotline used to collect information regarding compliance issues.
- Support IT & OT resilience through security controls, asset visibility, and categorization.
- Capability to identify, detect, and respond to cyber threats in a standard and effective manner.
- Be able to group critical assets and increase the level of security controls in place for those assets.
- Central management and monitoring of identities used at CWS.

CWS Values

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Abbreviations

CIS: Center for Internet Security
EDR: endpoint detection and response
IT: Information Technology
NCSR: National Cybersecurity Review
OT: Operational Technology
PCI: payment card industry
WRRF: water resource recovery facility



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADMINISTRATION			
Internal compliance: increase capabilities & maturity		Develop & prioritize list of audit projects	Scope internal audits
		Develop audit policies & procedures	Create audit templates
		Create audit work plan & report templates	Create audit policy
			Discovery of an audit tracking system
Internal compliance: ethics hotline		Develop hotline policies & procedures	Select third-party hotline vendors & begin hotline operations
Cybersecurity: Increase capabilities & maturity	PCI compliance		
	Renew cyber liability insurance		
	Conduct cybersecurity tabletop exercise		
	Information security training		
	NCSR assessment		
	Update & review Incident Response Plan		
	Develop & review Information Security Policy		
	Conduct external penetration test		Conduct internal/external penetration test
		Assess IT & OT cybersecurity (by third party)	Assessment remediation
	Vulnerability management		Audit internal CIS security controls - IT
Cybersecurity: Modernize & innovate		Deploy privileged access system	
			Zero trust architecture – internal assessment

Objective	Initiatives		
	FY 24	FY 25	FY 26
Cybersecurity: System availability & disaster recovery		Assess data loss prevention system	Backup Procedure Audit - IT Deploy data loss prevention system – Phase 1
Cybersecurity: Enhance IT governance		Create cybersecurity risk register	Document standard security process for software: current/future Adopt cybersecurity risk register

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
INTERNAL COMPLIANCE						
Maintain a high level of hotline responsiveness	Service level	Percentage of hotline comments investigated & closed	100%	N/A	N/A	25%
Increase compliance audit productivity	Service level	Number of compliance audit projects completed	5	N/A	N/A	2
Reduce incidence of noncompliance	Performance measure	Number of out-of-compliance determinations	0	N/A	N/A	Initial creation
CYBERSECURITY						
Automation	Service level	Rate of manual cyber-alert remediations	10%	80% (1,365)	75%	40%
Increase capabilities & maturity of cybersecurity program	Service level	Cyber alert: average time to remediate	6 hours	22 hours	16 hours	8 hours
Increase capabilities & maturity of cybersecurity program	Performance measure	Cybersecurity training completion rate	98%	80%	90%	95%

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Increase capabilities & maturity of cybersecurity program	Service level	Test phishing click rate	4%	13.5%	10%	8%
Automation	Service level	Manual email security investigations rate	20%	100% (850)	90%	70%
Enhance IT governance	Service level	Percentage of information security policies reviewed & updated	100%		50%	75%



FY24-26



Legal Services

The in-house legal team provides legal advice on complex and dynamic legal, regulatory, and business matters related to wastewater treatment, stormwater management, watershed enhancement, and general water resource recovery issues. Legal Services gives proactive and practical advice to CWS groups to assist their business needs while protecting the legal interests of the organization. Members of the Legal Services team draft a variety of documents including contracts, easements, ordinances, and intergovernmental agreements and answer questions about the purchasing rules, procurements, contracts, real property, environmental and municipal law, construction disputes, permits, and other legal matters. The General Counsel & Chief Compliance Officer retains and manages outside legal counsel on complex issues or litigation when needed.

Goal

- Timely, efficient, and effective services that meets the needs of stakeholders
- Review contracts and documents in a timely manner
- Ensure legal sufficiency of all contracts
- Ensure timely legal compliance
- Educate CWS employees on legal matters to protect the legal interest of the organization

Advantage

- Legal expertise in Oregon law, CWS purchasing and regulatory rules, ordinances, and public records
- Subject matter experts in contract law, environmental law and regulation, public contracting, real property law, Board resolutions, public meetings, document review, drafting ordinances, labor and employment law, and compliance

Scope

- Protect Clean Water Services legal interest.
- Advise key internal customers, coordinate with outside counsel, and process public records requests on behalf of CWS

Value - Added

- Preserve organization resources by mitigating legal risk and proactively addressing issues to avoid costly litigation
- Draft, review, and finalize legal documents
- Advise internal customers on daily work that requires legal expertise
- Manage outside counsel on CWS issues
- Negotiate with opposing counsel
- Educate CWS employees on legal matters to protect the legal interest of the organization

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Abbreviations

DS: Digital Solutions

GS: Goal Share, Goal Sharing

HR: Human Resources

IGA: intergovernmental agreement

RAD: Regulatory Affairs department

SOP: standard operating procedure




PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Public records response & training	Evaluate & improve public record request process 	Evaluate & improve public record request process	Records management policy & implementation
	Begin training in public records request & records management for all staff	Continue training on public records & records management best practices for all staff	Ongoing training on public records & records management best practices for all staff
Provide purchasing rules services			Update policies & procedures to reflect new laws, requirements & vendor request
Provide contract review services	Administer Legal queue		
	Develop Legal queue SOP		Ongoing enforcement of Legal queue SOP
	Provide training on Legal queue workflow, including check-in, check-out, using comments, accountability, tracking status & approval		
Administer notary public program	Develop & administer notary public program	Provide notary services to CWS	
Provide general legal services	Provide general legal services & legal advice as needed to support CWS operations		
Provide legal compliance auditing	Provide random sampling contract compliance auditing		Provide random sampling compliance auditing
Review legislative bills	Review legislative bills to assess CWS risk & potential impact to wastewater & stormwater utilities		
Review real property transactions	Draft, review & revise real property documents including purchase & sale agreements, easements & encroachment agreements		
Provide legal assistance in preparing legal documents	Negotiate terms & conditions of agreements for documents, including real property, IGAs, easements, contracts & other documents with outside counsel		
Provide litigation services	Manage services of outside legal counsel		
	Managing disputes including mediation, arbitration & trials		



Objective	Initiatives		
	FY 24	FY 25	FY 26
Legal assistance to HR	HR to determine which employment matters will be handled by Legal Services		Advise on all aspects of labor & employment
Harassment & discrimination policy		Develop harassment & discrimination policy. Develop training for the harassment & discrimination policy	Develop harassment & discrimination policy. Develop training for the harassment & discrimination policy 
Provide legal support to RAD	Continued support for RAD; start the process for a new counsel for RAD	Continued support for RAD; hire new counsel for RAD	General Counsel & Chief Compliance Officer continue to advise & support new RAD counsel
Legal data management system		Work with DS to identify a provider to support legal data management system	Select provider for legal data management system
Develop cohort related to Oregon public records, Oregon ethics, procurement & agency authority 101		Identify cohort for Oregon public records, Oregon ethics, procurement & agency authority 101	Cohort training with departments on public records, public purchasing, public ethic laws & political activity  Develop job description for paralegal position, establish position & hire

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Public records request response & training	Service level	Improve public records request response time (business days)	2	2	2	2
Public records request response & training	Service level	Number of public records requests requested & completed	160	127	160	160
Provide contract review services	Service level	Number of tickets reviewed	380	245	380	400



FY24-26



Procurement

Procurement manages CWS' procurement function, which includes purchasing and contracting for goods, services, and construction. Procurement responsibilities include helping CWS staff members conduct competitive purchasing and contracting processes and developing and ensuring compliance with CWS purchasing policies.

Goal

- Timely, efficient, and effective services that meet the needs of stakeholders
- Meet 100% of internal customer service needs and legal compliance

Advantage

- Provide expertise in options and alternatives for contracting services and equipment purchasing
- Conduct highly organized and well-planned day-to-day operations
- Effectively communicate amongst team to share best practices
- Integrate diverse knowledge and innovative employee approaches
- Provide adaptive and timely procurement service based on customer needs

Scope

- Purchasing and contract support services for internal customers

Value - Added

- Oversee and ensure compliance with laws and regulations
- Liaison between internal customers and finance, suppliers, and vendors
- Contract management services
- Purchasing support services
- Support EDI initiatives within region

Abbreviations

COBID: Certification Office for Business Inclusion and Diversity

EDI: equity, diversity, and inclusion

FO: Field Operations

O&M: operations and maintenance

SOP: standard operating procedure

WET: Water & Engineering Technology department

WRRD: Water Resource Recovery Operations & Services department

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PE Strength & Opportunities



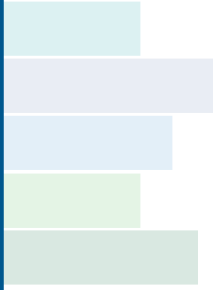
Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
PROCUREMENT			
Ensure compliance with state law and CWS purchasing rules, policies & procedures	Review existing laws, rules, policies & procedures & create SOPs for procurement processes		
Provide excellent internal customer service	Create procurement role matrix	Work with Administrative Services to define roles and responsibilities between admin and procurement support	Develop a Service Level Agreement with one dept that identifies roles, responsibilities & timelines for review
Develop and implement innovative approaches to contracts & purchasing	Develop & implement innovative approaches & methods (e.g., alternatives to low-bid process, special procurements, buying used goods)		
		Evaluate contract management software	Purchase & implement contract management software & train staff
Increase equity, diversity& inclusion in CWS contracting	Create & implement direct/mandatory selection process	Continue direct/mandatory selection process	Refine & monitor EDI Procurement Plan years 3-5
Reduce cost of CWS purchases	Expand use of cooperative & competitive purchasing of low dollar value goods & materials		Conduct pilot project establishing on-call contracts for frequently needed services & goods
Maximize return on surplus inventory			Work with WRRD, O&M & WET to review, refine & optimize process for determining & declaring surplus inventory at CWS property
Procurement staff training & development	Cross-train staff to balance work effort & optimize allocation of staff resources		
BUSINESS OPPORTUNITIES			
Identify & pursue new business opportunities	Begin Rock Creek cogeneration project	Begin Durham digester gas utilization project	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actuals FY 24	Estimate FY 25	Estimate FY 26
Ensure compliance with state law & CWS purchasing rules, policies & procedures	Service level	Number of SOPS developed or updated	8	8	4	8
Provide excellent internal customer service	Service level	Number of Procurement/Dept. role matrix or Service Level Agreements developed	1	100%	1	1
Increase equity, diversity & inclusion in CWS contracting	Performance measure	Number of COBID firms solicited using direct/mandatory process	10	1	5	10
Develop & implement innovative approaches to contracts & purchasing	Service level	Contract management software evaluation, implementation/training	100%	25%	100%	75%



Regional Utility Services Department



FY24-26

RUSD

Regional Utility Services

Full-time employees: 44

Departmental operating budget: \$10,772,900

Regional Utility Services leads CWS' efforts to build awareness, empower action, and cultivate strong, collaborative relationships with customers and stakeholders for regional implementation of the National Pollutant Discharge Elimination System watershed-based permit. This effort supports understanding and protection of both natural and built environments while aligning with economic development, community values, and planning goals. RUSD promotes CWS' role in long-term watershed health by managing the organization's communications, public outreach, and strategic partnerships with local governments, community organizations, businesses, the development sector, preK-16 learners, and the media.

Key Strategic Outcomes (KSO):



Abbreviations

CIP: Capital Improvement Program
 CPO: Community Participation Organization
 CWAC: Clean Water Services Advisory Commission
 D&C: Design and Construction (Standards)
 GIS: geographic information system
 IGA: intergovernmental agreement
 LDR: limited development reviews
 NPDES: National Pollutant Discharge Elimination System
 RUSD: Regional Utility Services department
 SDC: System Development Charge















PE Strength & Opportunities









Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Additional acres of stormwater managed	100	82	100	100
Regional CIP projects receiving regional funding	8	9	10	10
Regional SDC project reimbursements to cities	\$6,036,000	\$7,478,500	\$7,637,000	\$6,036,000
Regional environmental site certification & assessment reviews	170	173	175	170
CWS Essentials annual training participants	50	N/A	50	50
CWS Civic Academy participants (FY27 start)	25			25
City connection permit authorization reviews	200	155	185	200

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Percent of city connection permit authorizations within time frames	90%	83%	50%	75%
Percent of regional environmental site certification & assessment reviews completed within time frames	90%	95%	93%	95%
NPDES permit compliance measures tracked	95%	90%	95%	95%
CWS Relationship Framework developed & adapted	100%	N/A	50%	100%
Percent of CWS Essentials participants who say they are "satisfied" with training	90%	N/A	80%	90%
Percent of stakeholders who biannually say CWS is successful in its commitment to the community & Tualatin River health	90%	N/A	82%	N/A
Identify & recommend CWAC community representatives	100%	100%	100%	100%
Number of key civic partnership engagements & educational presentations	50	N/A	40	48

Objectives	Initiative Statements	KSO
Ensure NPDES permit compliance & support economic development & community planning goals through regional coordination of sanitary & stormwater utilities	Manage operating intergovernmental agreements to ensure effective service delivery & alignment with & co-implementation of key initiatives.	
	Coordinate regional implementation of D&C Standards to ensure alignment with the watershed-based permit.	
	Coordinate regional integration of sanitary sewer capital planning, subbasin stormwater strategy development & implementation through participation in long-range systems & land-use planning efforts, including GIS analysis supporting CWS programs.	
	Facilitate the implementation of local & regional infrastructure projects between CWS, co-implementers & private development.	
	Provide regional coordination, partnership & local implementation of NPDES permit requirements for public involvement, student & adult education & outreach, construction site runoff control, post construction runoff standards, retrofits & compliance reporting.	
	Provide regional quality control, compliance oversight & coordinated performance reporting of plan review, erosion control & vegetated corridor inspection programs across CWS.	
	Proactively assist & engage developers in & developer-constructed infrastructure to assure capacity for growth in both the sanitary & storm sewer systems.	
Educate community & strengthen relationships to support regional economic & environmental vitality	Coordinate the Relationship Framework to align internal CWS strategies for maintaining CWS' transactional, strategic & transformational partnerships.	
	Deliver annual CWS Essentials learning events & produce monthly newsletter for City elected officials to build trust, credibility & support for CWS & its role.	
	Educate & partner with key civic audiences on projects, programs & the permit including CPOs, CWAC, business & development community, Tualatin Basin Partners for Clean Water & environmental advocacy groups.	
Foster organizationwide understanding of customer-stakeholder continuum expectations & needs	Conduct biannual Stakeholder Insight Survey & Customer Awareness & Satisfaction Survey to align with the CWS leadership system's "understand stakeholder requirements & expectations" & to inform the organization's Relationship Framework.	
	Regularly monitor & help provide efficient customer-stakeholder engagement opportunities & systems aligned with Performance Excellence's Customers Category.	

Objectives	Initiative Statements	KSO
Build & sustain an expert, adaptive & informed RUSD team	Regularly optimize team resources to maintain expert, timely service levels & performance-based service commitments aligned with current regulations, community needs & the Climate Action & Long-term Regulatory Compliance Strategic roadmaps.	
	Establish clear career pathways for employee retention & effective team organization.	
	Develop & regularly update well-rounded learning plans for each team member to build water-sector awareness & technical expertise, communication skills & strategies for equity, diversity, inclusion & belonging within the team & engagement with the community.	
	Implement effective Gallup Action Plans to build a collaborative culture & enhance value for work.	
	Create opportunities for advancement through crossover training & promotional opportunities.	
	Foster cross-departmental collaboration to share knowledge & strengthen internal relationships across CWS through Passport presentations, Let's Get Engaged strategy & participation on the Integrated Project Coordination Team.	



FY24-26



Communications & Community Engagement

The Communications & Community Engagement (CCE) team cultivates a community that understands, values, and actively contributes to CWS achieving its Key Strategic Outcomes. CCE's approach prioritizes building mutually beneficial relationships, earning trust, enhancing credibility, and increasing widespread support for the organization's essential role in nurturing a region where individuals, businesses, and the built and natural environments can thrive.

CCE leads the organization's strategic communications and marketing, stakeholder engagement, education and outreach, and creative services. Staff members tap into community values, needs, and expectations to create positive and impactful experiences, encourage watershed-friendly behaviors, and engage targeted audiences in major CWS initiatives, including climate action, thermal, and long-term regulatory compliance strategies.

The team regularly informs and connects with residents; business, industrial, and agricultural communities; preK-16 learners; volunteers; the media; opinion leaders; the CWS Board of Directors and Clean Water Services Advisory Commission; community organizations; and watershed stakeholder groups to build trust and to motivate action in support of both the natural and built environments.

Goal

- Understand and empathize with community needs, values, and expectations for CWS to reach its Key Strategic Outcomes
- Monitor CWS performance in meeting identified community values through consistent research and strategic engagement
- Build trust, credibility, and support for CWS through transparent, inclusive, and relevant internal and external engagement
- Empower the community to act on behalf of both the natural and built environments for successful regional stewardship
- Leverage transformational, strategic, and transactional community partnerships

Advantage

- Relationship-building professionals who listen, interpret and personalize complex subjects for targeted audiences
- Skilled in community relations, journalism, public involvement, facilitation, behavior change, research, education and outreach, graphic design, user experience, public relations, and marketing
- Empathetic approach for mutually beneficial internal and external relationships
- Enterprise-wide program with knowledge of CWS initiatives, opportunities, and challenges
- Committed to CWS equity initiatives and aligned with regional community values

Scope

- CWS workforce, customers, stakeholders, and governance

Value - Added

- Establish a clear and consistent brand to build trust and credibility for CWS' role in protecting public health and the environment
- Tap into community values, needs, motivations, barriers, and expectations through prioritized and targeted research
- Apply strategic storytelling through personalized verbal, written, and visual communication to motivate, reassure, and educate audiences
- Conduct multifaceted community-based social marketing to connect audiences with their built and natural environments to meet regulatory requirements
- Understand and collaborate with partners to create a thriving community
- Increase customers' feeling of value for their investments and the dedicated efforts of CWS and its partners
- Enhance the feedback loop between the community, the Board, CWAC, and CWS

Abbreviations

ADA: Americans with Disabilities Act
Board: Clean Water Services Board of Directors
CAIRO: Center for African Immigrants and Refugees Organization
CCE: Communications & Community Engagement
CEL: Culture, Equity & Learning
COS: chief of staff
CRM: customer relationship management
CURO: chief utility relations officer
CWAC: Clean Water Services Advisory Council
DOJ: Department of Justice
DS: Digital Solutions department
FOT: Friends of Trees
GS: Goal Share, Goal Sharing
HR: Human Resources department
KSO: Key Strategic Outcome
LGE: Let's Get Engaged
NSES: Natural Systems Enhancement & Stewardship department
PE: Performance Excellence
PMSP: Portland Metro STEM Partnership
ripl: Research+Innovation+Partners+Labs
RUSD: Regional Utility Services department
SAGE: Strategic Advisory Group to the Executive
SOP: standard operating procedure
STEM: science, technology, engineering, and math
SWMP: Stormwater Management Plan
TWC: The Wetlands Conservancy
TRK: Tualatin Riverkeepers
TSWCD: Tualatin Soil and Water Conservation District
TRWC: Tualatin River Watershed Council
TVWD: Tualatin Valley Water District
WRRD: Water Resource Recovery Operations & Services department

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.





PE Strength & Opportunities




Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Integrate CWS policies, programs, initiatives with the values, needs & expectations of the community		Conduct situational assessment of current engagement approaches, gaps, needs & barriers within underrepresented communities	Phase II: Evaluate initial data & workshop feedback & develop a comprehensive strategy for engagement planning with underrepresented communities
		Conduct proactive community engagement within underrepresented communities in partnership with Centro Cultural de Washington County based on the results of assessment	
	Implement an enterprise CRM tool. Includes organization-wide inventory & research of options	Implement CRM & conduct end-of-year evaluation including heat map of community issues	
			
		Survey customers with inquiries/concerns to evaluate customer experience	
	Maintain consistent participation in PMSP to develop community relationships that foster education opportunities		
	Manage & increase participation from Tualatin Basin Partners for Clean Water	Manage & evaluate Tualatin Basin Partners for Clean Water & align with Relationship Framework & collective impact initiatives	
	Work with COS to recruit, research, vet & onboard new CWAC members. Collaborate with COS to develop meeting agendas & presentations		
	Conduct 2023 biannual Customer Awareness & Satisfaction Survey, including results presentations to staff, CWAC, Board & identified stakeholders. Prioritize recommendations	Implement recommendations of 2023 survey to increase awareness & understanding & build trust & credibility for CWS, its partners & their work	Conduct 2025 biannual Customer Awareness & Satisfaction Survey; present results to staff, CWAC, Board & identified stakeholders. Prioritize recommendations
	Execute Fernhill Visitor Survey	Implement recommendations of Fernhill Visitor Survey	Implement recommendations of Fernhill Visitor Survey. Evaluate opportunity for a goal share

Objective	Initiatives		
	FY 24	FY 25	FY 26
Integrate CWS policies, programs, initiatives with the values, needs & expectations of the community	Draft biannual Stakeholder Insight Survey; present results to staff, CWAC, Board & identified stakeholders. Prioritize recommendations	Conduct Stakeholder Insight Survey for mutually beneficial business relationships. Create & deliver presentations to staff, CWAC, Board, & identified stakeholders. Prioritize recommendations	Implement recommendations & plan for FY26 Stakeholder Insight Survey
	Co-develop equitable procurement research with Procurement, CEL & NSES teams; present results to staff, CWAC, Board & identified stakeholders. Prioritize recommendations	Co-develop & execute developer applicant research with RUSD and integrate results of Stakeholder Insight Survey. Prioritize recommendations	Implement recommendations from developer application research & connect to Stakeholder Insight Survey. Continue to update & strategize CWS community survey work
	Draft focus group questionnaire to update CWS ratepayer values	Conduct focus groups to update CWS benchmarked ratepayer values. Create outreach plan to present results to staff, CWAC, Board & identified stakeholders. Prioritize recommendations	Implement, incorporate & prioritize recommendations into FY26 Customer Awareness & Satisfaction Survey.
	Co-develop Voice of the Customer strategy with RUSD & identified staff to listen, engage with & evaluate customer-stakeholder requirements as part of PE		Consider possible goal share for Voice of the Customer Strategy.
Empower a climate-ready community that is connected to nature & cares for our built & natural environment	Support implementation of outreach component of the Fernhill North Plan	Advise & incorporate community values into Fernhill North Plan	Advise & incorporate community values into Fernhill wayfinding
	Develop & execute Fernhill Visitor Experience Plan	Co-create & deliver intentional programming with internal & external partners based on Fernhill Visitor Experience Plan priority list	
			
	Implement the Student Education Strategy	Evaluate & adapt Student Education Strategy	Evaluate & adapt Student Education Strategy
	Implement prioritized partnerships identified through PMSP	Evaluate & adapt priority partnerships through PMSP	
	Coordinate & adaptively manage the facility tour program. Collaborate with WRRD to provide tours		
	Develop criteria & prioritization list to manage & participate in community events & presentations	Implement community event strategy & promote throughout CWS	


Objective	Initiatives		
	FY 24	FY 25	FY 26
Empower a climate-ready community that is connected to nature & cares for our built & natural environment	Assess & adaptively manage community science program with partners, including outreach plan		
	Co-develop, manage & promote the Tualatin River Watershed Navigator Program with community partners & identified staff		
	Co-develop ripl business plan to build global water community awareness of & engagement with ripl & its products & services		Execute ripl marketing plan & update ripl brand plan if needed
	Develop & execute Year 2 annual public awareness & behavior change campaign. Align with awareness recommendations from recent survey work & CWS SWMP		Develop & execute public awareness & behavior change campaign aligned with recent survey work & CWS SWMP
	Co-create & implement strategic community awareness & outreach outlined in Climate Action & Long-Term Regulatory Compliance strategic roadmaps. Integrate community values, CWS equity initiatives & leverage partnerships		Implement community engagement & strategic communications outreach plan for the Climate Action & Long-Term Regulatory Compliance strategic roadmaps
	Collaborate with TFA 2.0 Planning Committee to identify potential community engagement & communications opportunities supporting CWS goals	Draft engagement plan with collective impact partners (TFA 2.0) that align with CWS goals	Implement engagement plan with collective impact partners, aligned with CWS goals
Provide equitable access to information & participatory opportunities	Develop and implement templates for ADA-compliant and Spanish-translated public information	Work with Gov't Affairs & DS teams to audit digital communication platforms to determine gaps & opportunities to meet DOJ's ADA Title II compliance. Also determine language accessibility requirements & needs	Develop enterprise user accessibility strategy & implementation plan to meet language & DOJ ADA Title II compliance standards by April 20, in partnership with Gov't Affairs, Digital Solutions & compliance staff
	Continue to add ADA-compliant tags to photos per prioritization & procure assets in Canto/digital asset database		
	Create & implement a bilingual/bicultural communications & outreach strategy to transcreate enterprise content & ensure products are ADA compliant		Expand Grammar & Usage Guide to include translation & ADA Title II compliance guidelines


Objective	Initiatives		
	FY 24	FY 25	FY 26
Provide equitable access to information & participatory opportunities	Implement identified & prioritized culturally specific community engagement with CAIRO, Centro Cultural & other organizations outlined in Education Strategy & CWS Relationship/Partnership Framework		
	Identify culturally specific participatory opportunities with community partners, including Bird Alliance of Oregon, FOT, TWC, TRK, TSWCD & TRWC among others through prioritized CWS Relationship Management Framework & Education Strategy		
	Develop Fernhill Visitor Experience Plan	Implement Fernhill Visitor Experience Plan	
Build awareness and credibility for CWS positive impact on region's environmental and economic vitality	Develop & execute Messaging Framework to align CWS brand, sub brands & results of community social research 	Update & communicate Strategic Communications Plan & Brand Plan aligned with the Messaging Framework, updated community values & recommendations from the Stakeholder Insight Survey	Integrate principles of Strategic Communications Plan. Strategize update to the CWS Brand Plan
	Co-develop and implement utility relations communications & outreach plan with CURO & RUSD	Co-develop & implement utility relations communications & outreach plan with CURO & RUSD aligned with the Relationship Framework.	Implement utility relations communications & outreach plan
	Co-design & support CWS Essentials onboarding program for city representatives	Survey past participants to gather feedback & inform future programming. Implement recommendations	Support CWS Essentials onboarding program for city representatives with CURO
	Co-create and implement annual budget & rates communications with cities & TVWD	Draft outreach plan with CURO and Washington County's community engagement liaisons to gather input & build support for the community's investments	
	Co-manage employee communications with CEL through Pipeline & intranet	Manage new employee website project. Determine advisory group & host engagements to determine needs, gaps	Continue to implement employee website project for launch by December 2025.
	Co-manage CWS recruitment Co-manage employee communications with CEL through Pipeline & intranet marketing plan with HR & CEL	Co-manage CWS recruitment marketing plan with HR & CEL	








Objective	Initiatives		
	FY 24	FY 25	FY 26
Sustain an expert & informed team	Develop prioritization plan to regularly connect with staff to lead enterprise community engagement & brand management strategies aligned with community social research, permit, SWMP & Climate Action & Long-Term Regulatory Compliance strategic roadmaps	Develop prioritization plan to regularly connect with internal staff to lead enterprise community engagement & brand management strategies aligned with community social research, permit, SWMP & Climate Action & Long-Term Regulatory Compliance strategic roadmaps	Implement & adapt plan
	Co-charter enterprise Relationship/Partnership Management Framework for strategic business relationships to meet CWS KSOs		Implement & adapt Relationship Management Framework
	Develop, train & communicate CCE business operations framework		Research & pilot project management system
	Develop & execute LGE internal training	Develop & execute LGE internal training. Create SOP	Continue to promote LGE & collaborative community engagement planning to meet Organizational Excellence KSO.
	Inspire an engaged team by developing & executing yearly Gallup action plans		
	Create the Fernhill Visitor Experience Plan	Update Fernhill Visitor Experience Plan based on new opportunities	
	Implement & evaluate Student Education Strategy	Update Student Education Strategy	Continue implementation of Student Education Strategy
	Draft CCE team onboarding program	Execute CCE team onboarding program	Update onboarding program as needed
	Manage & communicate CWS Brand Plan, Strategic Communications Plan, & Identity & Style Guide (including Grammar & Usage Guide)		
	Support planning & production of Board engagements including Board packets & Board Learnings		Support communications & design needs for Board items
	Execute houselessness program	Work with SAGE to codify policy & procedures; centralize repository of resources	Build out Houseless Program to include charter, name & budget & share with employees

Objective	Initiatives		
	FY 24	FY 25	FY 26
Sustain an expert & informed team		Develop Administrative Policies for production & delivery of all CWS communications & creative assets	Continue to develop & promote Administrative Policies for production & delivery of all CWS communications & creative assets

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Integrate CWS policies, programs and initiatives with the values, needs and expectations of the community	Performance measure	Average % increase for residents who say CWS actions match their values “Describes CWS well” (survey)	10%	5%	N/A	10%
	Performance measure	% of residents who say they feel connected to the Tualatin River and its streams	70%	48%	N/A	70%
	Performance measure	% of residents who say CWS informs and educates how to reduce pollution	60%	40%	N/A	60%
	Service level	Evaluate and implement CRM system 	100%	50%	50%	N/A
	Service level	# of PMSP events attended	15	12	5	15
	Service level	# of community partners that participate in the Tualatin Basin Public Awareness Committee	8	7	7	7
	Performance measure	Build annual topic planning document, help strategize topic message, review & edit monthly CWAC presentations & agenda descriptions	100%	100%	100%	TBD
Empower a climate-ready community that is connected to nature & cares for its built & natural environments	Service level	# of activities resulting from connections made through PMSP	20	12	15	20
	Service level	# of engagements (clicks, shares, likes, comments) outlined in behavior change campaign	63,000	62,000	63,000	63,000
	Service level	# of impressions outlined in behavior change media campaign	8 million	6.96 million	8 million	8 million
	Service level	# of Fernhill Visitor Station visitors due to promotion & outreach	1,000	1,000	1,000	1,000

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Empower a climate-ready community that is connected to nature & cares for its built & natural environments	Service level	# of Fernhill volunteer hours completed	150	127.3	130	140
	Service level	# of Fernhill volunteer hours completed	150	127.3	130	140
	Service level	# of schools that participate in at least two educational activities per year	25	24	25	25
	Service level	# of community events attended per prioritization plan	10	8	8	10
	Service level	# of tours in public facilities	40	43	40	40
	Service level	# of student field & classroom presentations	160	141	150	150
	Service level	# of unique users to Watershed Navigator website	6,500	5,300	6,000	6,000
	Service level	% of identified equity-mapped zip codes that have at least one community science event (using equity map tool)	50%	N/A	N/A	30%
	Service level	# of culturally relevant opportunities for diverse & underserved communities at Fernhill 	5	2	4	4
	Service level	# of Title I schools engaged based on baseline data	20	15	17	20
	Service level	# of education programs delivered with identified culturally specific organizations	15	9	10	12

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Provide equitable access to information & participatory opportunities	Service level	% of English-language PDFs of four or fewer pages that are translated to Spanish 	50%	N/A	N/A	N/A
	Service level	% of PDFs that are ADA compliant 	60%	N/A	N/A	N/A
	Performance Measure	% of CWS print & digital communications & graphics that are ADA Title II compliant 	100%	N/A	50%	80%
Build awareness & credibility for CWS positive impact on region's environmental & economic vitality	Performance measure	% annual average Community Connection open rate	50%	44%	44%	50%
	Performance measure	% annual average Clean Water Connection open rate	50%	~45%	~47%	50%
	Service level	# of Newsroom visitors	6,000	~5,500	~5,800	6,000
	Service level	Updated Brand & Narrative Plan 	100%	N/A	100%	N/A
	Performance measure	% of residents who say that Clean Water Services is doing an excellent, good & fair job (survey)	90%	80%	N/A	90%
Sustain an expert & informed team	Service level	Train 100% of CWS identified staff on Let's Get Engaged 	100%	100%	100%	100%
	Performance measure	% Gallup score for "I know what's expected of me"	4.0	3.56	3.9	4.0
	Service level	Develop workflow & best practices to load assets into Canto. Train core users in CCE 	100%	100%		100%
	Service level	Develop CCE staff onboarding program 	100%		100%	100%

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Planning & Development Services

Planning & Development Services is responsible for working with partners on economic and community planning, managing developer-donated infrastructure construction and acceptance, and utility intergovernmental relations.

Planning & Development Services provides local program services within urban unincorporated Washington County and the cities of Banks, Durham, Gaston, King City, and North Plains. Local services include development planning, review, permitting, and inspection of new development, sanitary and stormwater management infrastructure; erosion control; vegetated corridor enhancements; and system connections. The scope includes residential, commercial, industrial, and public projects, as well as single-family homeowner and tenant improvements. This group also administers the private stormwater management facility inspection program.

Planning & Development Service also provides regional program services to the entire service area including all partner cities. Regional services include utility and subbasin planning, environmental plan review, agent to the Department of Environmental Quality for the 1200-C erosion control program, and implementation of the Design and Construction Standards. This group issues connection permits and collects System Development Charges, Regional Stormwater Management Charges, and fees-in-lieu. This group also manages the Capital Improvement Program Prioritization committee responsible for distributing regional funding among co-implementer cities and coordinates public-private partnership projects with developers and other partner agencies. The group administers Local Improvement Districts and Reimbursement Districts, manages new annexations to the service area, and evaluates septic system permit requests to ensure compliance with state law.

Goal

- Timely and effective services that meet the needs of stakeholders, maintain compliance with applicable permits and regulations, and achieve build-out of a resilient and maintainable stormwater and sanitary system

Advantage

- Reputable and trusted relations with development community
- Responsive and committed to building and maintaining equitable partnerships
- Understanding and guiding regulations to protect the Tualatin River Watershed
- Experienced leadership, expert team, collaborative work culture
- Integration of diverse employee knowledge and innovative employee approaches

Scope

- Development customers, community members, co-implementing cities, Washington County, and internal department partners

Value - Added

- Supporting sustainable growth and economic development opportunities within Washington County
- Ensuring compliance with D&C standards and MS4 section of the NPDES permit
- Managing financial and partner agreements with co-implementers and developers
- Managing and archiving record development documents and system as-builts
- Responsible and equitable collection and distribution of SDCs and similar fees
- Integrating utility and subbasin planning with local land use and other planning
- Leverage expertise to influence and respond to policy changes at a regional scale

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

1200-C/CN: Construction Stormwater General Permits
ARPA: American Recovery Plan Act
BPM: business process management
CIP: Capital Improvement Program
CIPP: Capital Improvement Program Prioritization (Committee)
D&C: Design and Construction (Standards)
DEQ: Department of Environmental Quality
DLCD: Department of Land Conservation and Development
EDI: equity, diversity, and inclusion
F&A: Finance & Accounting department
FIL: fee-in-lieu
FO: Field Operations
GIS: geographic information system
GS: Goal Share, Goal Sharing
IGA: intergovernmental agreement
LDR: limited development review
LID: Local Improvement Districts
LIDA: Low Impact Development Approaches
LUT: Land Use & Transportation at Washington County
MOA: memorandum of agreement
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
O&M: Operations and Maintenance
PTP: payment to provide
R&I: Research & Innovation
RD: Reimbursement Districts
RAD: Regulatory Affairs department
RSMC: Regional Stormwater Management Charge
SAGE: Strategic Advisory Group to the Executive
SDCs: System Development Charges
SOP: standard operating procedure
SPL: service provider letter
SWMP: Stormwater Management Plan
THPRD: Tualatin Hills Park & Recreation Department

TMDL: Total Maximum Daily Loads

UGB: Urban Growth Boundary

VCEF: vegetated corridor enhancement fee

WashCo: Washington County

WRRD: Water Resource Recovery Operations & Services department

YDO: Your-DEQ Online



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 23	FY 24	FY 25
ENSURE COMPLIANCE WITH THE WATERSHED PERMIT, PERFORMANCE STANDARDS, SWMP, IGAS & D&C			
Provide transparent, efficient, effective local planning, plan review, permitting, inspection & record management services	Complete plan reviews & issue permits in a timeframe consistent with development needs	Complete all aspects of the development review, permitting, inspection & acceptance process in a timeframe consistent with customer needs. Ensure project & program compliance with D&C and watershed permit requirements	
	Inspect development projects in a timely manner to ensure compliance with permit requirements & D&C.		
	Ensure timely mapping of all donated infrastructure, easements & other local program assets in GIS	Manage records for all development-related documents including as-builts, reports, easements & other real property documents	
	Collect & track RSMC & FIL for stormwater management		Collect & track RSMC & FIL for stormwater management. Update methodology based on metrics & regulatory framework
	Inspect private water quality facilities to ensure permitted facilities remain functional. Develop strategy for providing personalized education & outreach for single-family property	Manage private stormwater management program, provide technical support to facility owners & inspect to ensure facilities remain functional	
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	Provide technical assistance, interpretation & training on D&C Standards, erosion control & private water quality facility program	Provide technical assistance, coordination & training with co-implementer partners on D&C Standards, erosion control, private stormwater management program, SWMP, asset transfer agreements & other topics as needed	
	Implement city connection authorization process & explore options for alternative processes		
	Work with Hillsboro to implement alternative connection authorization & audit processes described in IGA		

Objective	Initiatives		
	FY 23	FY 24	FY 25
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	Identify & develop key policy concerns list related to regional & local Development Services program elements that impact city & CWS business	Analyze policy topics & engage SAGE in preparation for D&C update	Develop strategy & begin to implement D&C update
	Manage 1200-C/CN erosion control program as agent to DEQ & issue permit coverage according to existing MOA		
	Coordinate with DEQ on 1200-C MOA update	Align applicant process with YDO & updated DEQ 1200-C MOA (1993)	Coordinate with DEQ on 1200-C MOA (1993) update & align applicant process with new MOA & YDO when it becomes available
	Provide Environmental SPL review, coordinate with county & cities on approvals & inspections, coordinate VCEF, PTP & advanced mitigation banking	Provide Environmental SPL technical review & issuance; coordinate with county & cities on implementation and inspections	
	Develop an improved vegetated corridor inspection services support program for cities		
	Manage VCEF, PTP & advanced mitigation tracking		Manage VCEF, PTP & advanced mitigation tracking. Update tracking system
	Manage product review and approval process	Update & implement product review and approval process	
	Track & implement Operating IGAs with partner cities & WashCo	Participate in updating & implementing Operating IGAs with partner cities & WashCo	Coordinate update & implementation of Operating IGAs with partner cities & WashCo
	Coordinate with co-implementing cities to document permitting inspection & O&M data. Track compliance with the Performance Standards, SWMP & watershed-based permit. Complete annual reporting in partnership with RAD		
	Partner with RAD & co-implementing cities to develop a plan to update post construction & erosion control components of SWMP		Partner with RAD & co-implementing cities to update post construction & erosion control components of SWMP

Objective	Initiatives		
	FY 23	FY 24	FY 25
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	Manage the Stormwater Retrofit Program; track & implement with internal & external partners		
	Coordinate with DLCD on developing guidance for utility planning. Update Service Availability Letters for land use applications, incorporate middle housing regulations	Monitor & respond to changes in development types, regulatory requirements & legislative actions. Provide input during rule-making processes & update standards & procedures as necessary	
	Coordinate with co-implementing cities, maintain regional GIS database. Implement a web app for asset transfer & O&M	Partner with GIS & co-implementing cities to ensure maintenance & accuracy of a regional GIS utility asset database	
	Participate in long-term regulatory compliance & stormwater strategic roadmaps		
REGIONAL PLANNING & DEVELOPMENT COORDINATION			
Manage planning & development activities to meet infrastructure expansion & resiliency needs. Enhance project coordination & communication internally & with local & regional partners.	Plan for UGB expansion	Work with partners to integrate subbasin planning & sanitary & stormwater infrastructure into long-range community planning efforts, including UGB expansion & concept plans	
	Develop framework for leveraging CWS goals, permit requirements, etc. with local planning & implementation efforts		
	Ensure development activity with significant increases in system use are coordinated with systems plan & affected CWS work groups. Meet infrastructure & resiliency demands	Coordinate with internal work groups to ensure infrastructure readiness for development activity	
	Pilot co-implementer exchange program. Optimize CIP project delivery	Manage & facilitate CIPP committee with co-implementer cities. Track & support partner projects & distribute regional SDC funding	
	Implement cross-departmental collaboration plan. Evaluate WashCo coordination & project process	Coordinate with partners to incorporate CWS infrastructure needs & natural systems opportunities into partner projects (ex. county, city, school districts, THPRD, developer).	

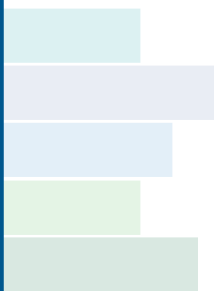
Objective	Initiatives		
	FY 23	FY 24	FY 25
Manage planning & development activities to meet infrastructure expansion & resiliency needs. Enhance project coordination & communication internally & with local & regional partners.	Manage a centralized utility coordination process, evaluate potential utility conflicts & engage affected work groups to facilitate a timely & complete response		Manage utility coordination. Develop & implement the Stage 0 project review process for WashCo planned projects
	Lead the development of cost-share agreements with project partners. Budget, track & support projects through planning, construction & final acceptance		
	Participate in CWS integrated project planning & delivery. Coordinate with development, land use & partner agency processes		
	Support subbasin planning & resilient stream corridor projects through planning & administration of tracking & funding mechanisms		
	Administer tracking & collection for RDs & LID programs. Respond to new customer requests & manage developer-initiated RDs		
	Coordinate on administration of ARPA septic system conversion grant		
OPTIMIZE SERVICE DELIVERY, CUSTOMER SERVICE & BUSINESS PROCESSES			
Optimize program delivery, customer service & consistency	Update & maintain Development Services Policy & Procedure SharePoint site, including inspection protocol for erosion control & escalating enforcement	Update & maintain group policy, procedure & reference documents	
	Provide continued support to development community on how to successfully & efficiently secure development-related approvals & permits	Support & educate the development community on how to successfully & efficiently secure project approvals & permits	
			Expand public education information about stormwater management & LIDA, include visuals & aesthetic considerations
	Update & maintain AMANDA database to maintain usability, improve workflows & respond to data needs		Update & maintain AMANDA database to maintain usability, improve workflows & respond to data needs. Launch Inspector App to improve data-collection efficiency

Objective	Initiatives		
	FY 23	FY 24	FY 25
Optimize program delivery, customer service & consistency	Develop applicant submittal portal, with targeted outreach & training plan	Launch web-based Permit Portal & partner with F&A to develop online payment option for applicants	Continue to expand Permit Portal functionality based on feedback. Add industrial discharge data fields to enhance review process with Environmental Services
	Support WRRD with management of Waste Disposal Pass fee collection & pass distribution		Support WRRD with management of Waste Disposal Pass. Update reports to eliminate duplicate data entry in AMANDA & SharePoint
	Complete historical easement digitization process	Evaluate Planning & Development Services historic & current records management procedures & transition to electronic where possible	Evaluate Planning & Development Services records management procedures & transition to electronic where possible. Transition as-built process to georeferenced or CAD-based submittals
			Work with Digital Solutions & F&A departments to streamline process & data management associated with new connections & billing account setup
CULTIVATE STAFF GROWTH & ORGANIZATIONAL LEARNING			
Support structured learning, foster career growth, retain talented staff & improve communication to achieve a resilient organization delivering high-value services	Refine & implement new staff training program	Refine & continue to implement staff training & department onboarding program	
	Support professional learning plans & training for each team member		
	Conduct self-evaluations, midyear check-ins & annual performance reviews with each team member		
	Support organizational-level learning by creating team & peer-to-peer learning opportunities across work groups		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Provide transparent, efficient, effective local plan review, permitting, inspection & record mapping services	Service level	Additional acres of stormwater managed through development	90	82	100	100
	Service level	Site development permits issued (unincorporated area and small cities)	45	46	30	45
	Service level	Connection permits issued (unincorporated area and small cities)	550	559	510	650
	Service level	Erosion control inspections	8,000	8,229	8,000	8,000
	Service level	Private water quality facility inspections	300	400	310	400
	Service level	Site development plan reviews	150	131	120	150
	Service level	Limited development reviews	750	643	650	650
	Performance measure	Percent of site development reviews completed within time frames	90%	60%	60%	60%
	Performance measure	Percent of LDRs within time frames	90%	97%	95%	95%
	Performance measure	Percent of private water quality facilities in need of nonroutine maintenance	<10%	7%	6%	6%
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	Service level	City connection permit authorization reviews	200	155	185	200
	Service level	Environmental site certification & assessment reviews	170	173	175	170
	Service level	# of stormwater retrofit projects completed	4	4	2	4
	Service level	NPDES permit compliance measures tracked	95	90	95	95
	Service level	# local technical advisory groups CWS participates in	8	10	10	6
	Service level	# regional & state advisory groups CWS participates in	5	10	10	6
	Performance measure	Percent of environmental site certification & assessment reviews completed within time frames	90%	95%	93%	95%
	Performance measure	Percent of city connection permit authorizations within time frames	90%	83%	50%	75%
	Performance measure	% co-implementers with stormwater outfall retrofit projects that meet MS4 pollutant reduction criteria	75%	33%	22%	50%

Objective	Metric	Measure	Target	Actual FY 23	Estimate FY 24	Estimate FY 25
Manage planning & development activities to meet infrastructure expansion & resiliency needs. Enhance project coordination & communication internally & with local & regional partners.	Service level	# city CIP projects receiving regional funding	8	9	10	10
	Service level	Total regional SDC project reimbursement to cities	\$6,036,000	\$7,478,500	\$7,637,000	\$6,036,000
	Service level	# of executed county & city partnership projects with a CWS cost-share IGA	5	4	3	4
	Service level	# of executed developer projects with development agreement for CWS cost-share	3	4	3	3
	Service level	# subbasin or watershed plans either led or supported by CWS	3	2	3	3
Optimize program delivery, customer service & consistency	Service level	# of workflows available to customers through the online Permit Portal	12	2	7	10
	Performance measure	% of development-related customer payments completed using the online Permit Portal	95%	0	35%	75%
Support structured learning, foster career growth, retain talented staff & improve communication to achieve a resilient organization delivering high-value services	Service level	# of interdisciplinary peer-to-peer trainings made available to team	20	16	10	14



Regulatory Affairs Department



FY24-26

RAD

Regulatory Affairs

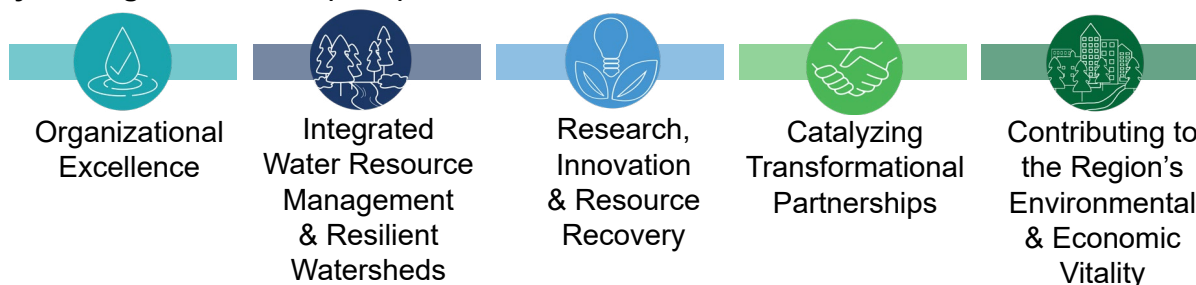
Full-time employees: 43

Departmental operating budget: \$10,463,300

Regulatory Affairs has three programs:

1. **Compliance Services:** Provides technical, scientific, regulatory, and policy support. This support includes analyzing environmental data related to protecting the public and watershed health; implementing the Tualatin River Total Maximum Daily Loads; and implementing and complying with CWS' watershed-based National Pollutant Discharge Elimination System permit, which includes the Municipal Separate Storm Sewer System permit, Air Contaminant Discharge permits, and provides guidance for compliance with hazardous and other waste programs. Support also includes tracking, evaluating, and influencing the development of state and federal environmental regulations.
2. **Environmental Services:** Implements the industrial pretreatment program under the federal Clean Water Act, including permitting and inspecting significant industrial discharges, hauled waste, local source control, and pollution prevention programs. Serves as the Department of Environmental Quality agent for the industrial stormwater permitting and compliance program. Investigates and responds to customer concerns and complaints about pollution entering waterways or conveyance systems.
3. **Laboratory Services:** Conducts environmental sampling and analysis for CWS to provide fundamental data for critical decision-making in areas such as watershed health, innovative research, performance of the water resource recovery facilities, and compliance with environmental regulations

Key Strategic Outcomes (KSO):



Abbreviations

1200-Z: stormwater discharge general permit
ACWA: Association of Clean Water Agencies
DEQ: Department of Environmental Quality
DM: Durham Water Resource Recovery Facility
EPA: Environmental Protection Agency
ES: Environmental Services
FOG: fats, oils, and grease
FTE: full-time equivalent or full-time employee
IDDE: illicit discharge detection and elimination
IGA: intergovernmental agreement
kcal: kilocalorie
MAHL: maximum allowable headworks loading
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
NTS: Natural Treatment System
PFAS: per- and polyfluoroalkyl substances
PS: pump station
R&I: Research and Innovation
RAD: Regulatory Affairs department
RNA: ribonucleic acid
RPA: reasonable potential analysis
SSO: sanitary sewer overflow
SWMP: Stormwater Management Plan
TMDL: total maximum daily loads
TRWC: Tualatin River Watershed Council







PE Strength & Opportunities













Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
COMPLIANCE SERVICES				
Update, submit & complete processing for the watershed-based NPDES permit	0 (no permit renewal)	1	1	
Update, submit & receive Air Contaminant Discharge permits	3 (DM, PS x2)	0	1	
Create next permit strategy, regulatory compliance integrated plan with DEQ & long-term compliance strategy & implement with the departments	1	N/A	1	
Manage flow release for augmentation & trading (in acre-feet)	14,272	11,178	10,136	
Submit routine NPDES & regulatory reports including ad-hoc reports	76	72	76	
Update SWMP, create stormwater structure for implementing new permit & update SWMP with adaptive management approaches	1 (2025-2027)	N/A	1	
Update city-county program IGAs	1	2	2	
Create & submit technical support documents for updating TMDL	N/A	N/A	N/A	
Develop document management, data flows & automated reporting processes				
ENVIRONMENTAL SERVICES				
Industrial permits with current permit requirements & completed routine inspections	62	N/A	65	
Source control investigation to water resource recovery facility operations (PFAS investigation, nitrates at DM, MAHL exceedance investigations, RPA special projects)	20	N/A	19	
Industrial facilities with PFAS management plans	35	N/A	19	
Industrial stormwater 1200-Z inspected	16	16	16	
LABORATORY SERVICES				
Analytical results	308,000	238,024	240,171	380,000
Compliance determinations	63,000	55,252	60,902	65,000
Special projects (R&I, ES investigations)	60	60	62	65
Designated, permit monitoring & sampling locations	92	99	99	99

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
COMPLIANCE SERVICES				
Annual reports completed on time	100%	100%	100%	
Compliance reports completed on time, including SSOs, permit excursions, illicit discharges & response to regulatory agency inquiries	100%	100%	100%	
Flow augmentation targets met	95%	95%	95%	
Million kcals generated by flow augmentation	2,500	2,489	2,500	
ENVIRONMENTAL SERVICES				
Water quality & IDDE investigations 50 average annual (100% follow-up)	100%	100%	100%	
Treatment facility disruptions (follow-up)	0	0	0	
Incident of ongoing noncompliance (12 months)	0	0	0	
Industrial users receiving compliance recognition (% of industries)	70%	50%	50%	
LABORATORY SERVICES				
Passing third-party performance testing analysis	100%	100%	100%	
Average daily results per laboratory FTE	61	56	53	65
Average projects per project manager	7	8	6	6
Treatment plant sampling completed (compliance)	100%	100%	100%	100%
Required industrial (compliance) %	100%	100%	100%	100%
Ambient & field sampling %	95%	85%	95%	95%

Objectives	Initiative Statements	KSO
COMPLIANCE SERVICES		
Implement the permit including creating near- & long-term compliance strategies	Continue the use of innovative permit compliance strategies by creating an integrated plan memorandum with DEQ. Develop a strategy to prepare for the next permit. Create a long-term compliance strategy. Implement with departments.	
Stormwater program update	Continue internal team to update stormwater program. Establish process for reporting on the SWMP & submitting associated reports as required by the permit. Establish process for working with cities to create an adaptive management program & update the SWMP (2.0).	
City / county IGAs	Complete Washington County, City of Beaverton & City of Cornelius IGAs. Participate as needed in IGA updates with all co-implementers as required by permit in 2026.	
Support & maintain CWS regulatory compliance	Track, evaluate & engage with state & federal environmental agencies as new regulations are in development.	
	Communicate compliance requirements to CWS programs & partners & develop the necessary infrastructure to ensure compliance with permits & other waste programs.	
	Work with agencies & ACWA to create a regulatory framework to allow expanding the recycled water use program to provide more opportunities to apply recycled water, including natural resource restoration.	
	Efficiently manage CWS' stored water supply at Scoggins Dam & Barney Reservoir by effectively releasing stored water for flow augmentation following IGAs.	
	Coordinate & support cooperative scientific studies with USGS, DEQ & TRWC to understand watershed processes & evaluate the effectiveness of future management practices in the Tualatin River Watershed.	
Prepare annual reports in a timely manner	Prepare, review & coordinate annual reports related to monitoring, effluent discharges, noncompliance incidents & permit compliance & define recommended actions for continual improvement.	
ENVIRONMENTAL SERVICES		
Achieve pretreatment effectiveness	Review, collect & evaluate data for new local limits & apply evaluation to next permit.	
	Improve the industrial survey process & develop internal & external training.	
Resilient staffing & sustainable resources	Develop & implement mentoring opportunities, career pathways & cross-training opportunities.	

Objectives	Initiative Statements	KSO
Proactively administer best management practices for the MS4 section of the permit	Partner with Compliance Services to implement SWMP & city IGAs at the organization level including FOG & IDDE response programs.	
	Standardize tracking & documenting IDDEs & response to customer complaints & develop training for the cities.	
Support troubleshooting of influent loadings at water resource recovery facilities	Use real-time dashboard to evaluate influent flows & loads to the water resource recovery facilities.	
LABORATORY SERVICES		
Perform compliance sampling & analysis on time	Adaptively manage NTS in accordance with Operations plan.	
	Expand staff operational capacity & depth of training to support key priority areas.	
	Collaborate & cross-train to improve & optimize business continuity.	
Formalize workplace procedures including safety	Streamline safety program through consistent practices & procedures.	
	Conduct multiple workshops & trainings to understand & optimize workflow between internal customers & Lab.	
Conduct special projects & method development	Collaborate with R&I to optimize EPA coliphage method & in-house R&I program RNA method.	
	Increase capacity on PFAS methodology through additional staff training.	



FY24-26



Compliance Services

Compliance Services ensures compliance with state and federal regulations while preserving public health and enhancing ecological resources in the basin through efficient use of public resources. The program offers technical, scientific, regulatory, and policy support, including analyzing environmental data for public and watershed health protection, implementing Tualatin River total maximum daily loads, and complying with CWS' National Pollutant Discharge Elimination System permit, which includes the Municipal Separate Storm Sewer System and Air Contaminant Discharge permits. The program tracks, evaluates, and influences the development of state and federal environmental regulations to create future compliance pathways.

Goal

- Provide timely, efficient, and effective compliance service that meets the needs of stakeholders
- 100% compliance

Advantage

- Comprehensive knowledge of state programs and regulations
- Skilled at developing permits, limits, and conditions that improve environmental outcomes and use of current infrastructure
- Ability to anticipate regulatory trends and plan for future regulatory conditions

Scope

- Regulatory compliance

Value - Added

- Influence state, regional, and national regulations
- Ensure compliance with state water quality, air, and waste regulations
- Provide support for internal and partner cities, including on stormwater
- Offer guidance and compliance for industrial treatment plants
- Provide planning support for direct implementation programs (stormwater, wastewater, research and innovation, and trading)
- Control our destiny by implementing creative compliance support solutions

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

ACWA: Association of Clean Water Agencies
CS: Compliance Services
DEQ: Department of Environmental Quality
DMR: discharge monitoring report
DO: dissolved oxygen
DS: Digital Solutions
eDNA: environmental DNA
FG: Forest Grove
GHG: greenhouse gas
GS: Goal Share, goal sharing
I&I: inflow and infiltration
IDDE: illicit discharge detection and elimination
IGA: intergovernmental agreement
IMD: internal management directives
MOA: Memorandum of Agreement
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
NSES: Natural Systems Enhancement & Stewardship department
O&M: operations and maintenance
PDP: professional development plan
PFAS: per- and polyfluoroalkyl substances
PT: pretreatment
R&I: Research & Innovation
RP: reasonable potential
RPA: reasonable potential analysis
SPCC: spill prevention, control, and countermeasure
SSO: sanitary sewer overflow
SWMP: Stormwater Management Plan
TMDL: total maximum daily loads
TPS: Treatment Plant Services
TRWC: Tualatin River Watershed Council
USGS: U.S. Geological Survey
WQ: water quality
WQS: water quality standards
WQT: water quality trading
WRRD: Water Resource Recovery Operations & Services department



PE Strength & Opportunities







Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
COMPLIANCE SUPPORT			
Implementing & complying with regulatory permits	Training & providing guidance on regulatory compliance issues & service requests		Training & providing guidance on regulatory compliance issues & service requests
	Ad-hoc noncompliance response efforts (e.g., SSOs, air quality, biosolids, etc.)		
Specific permit compliance requirements	Produce & review routine reports (recycled water, air discharge, GHG, biosolids, NPDES (I&I, WQT, PT), MS4, DMRs, SPCC plans, CWS emergency response plan)		
COMPLIANCE EFFICIENCY			
Improved reporting & compliance process management	Work with Digital Solutions to automate air discharge annual reports (GS: DW-10)		
	Work with DS to automate air discharge annual reports		Work with DS to refine & implement automated air discharge & reuse annual reports. Develop document storage procedures & platform
	Refine & beta test tool to track report development & data management & develop a dynamic compliance calendar	Implement & adaptively manage tool to track report development & data management & refine calendar notification process. Phase I completed	Adaptively manage tools to track report development & document management & refine calendar notification process
	Work with the Lab & DS to develop permit compliance tracking dashboard to track compliance with permit monitoring requirements	Work with the Lab & DS to develop permit compliance tracking dashboard to track compliance with permit monitoring requirements. Phase I completed	Work with the Lab & DS to develop permit compliance tracking dashboard to track compliance with permit monitoring requirements
	Work with WRRD to develop air quality compliance program management structure		Work with WRRD to develop air quality compliance program management & document structure
	Work with NSES to develop strategy to optimize riparian planting program for thermal compliance & climate change resiliency		Work with other CWS departments to develop thermal compliance strategy to optimize WQT program & climate change resiliency

Objective	Initiatives		
	FY 24	FY 25	FY 26
COMPLIANCE SUPPORT			
Improved reporting & compliance process management		Work with R&I to refine & update model, develop tool for managing flow	
	Work with the Lab to review & evaluate current watershed monitoring sites		Comprehensive review & evaluation of watershed monitoring sites, contracts, priorities, funding, ownership, safety & access
PREPARATION FOR FUTURE PERMIT			
Prepare for future permit issues & anticipated limit	Identify & outline principal issues for next permit & begin outreach to internal & external stakeholders for input	Develop permit conditions & expectations for next permit & prepare for permit renewal application	
	Work with R&I & NSES to conduct drone & eDNA surveys to gather data at outfalls for mixing zone fish passage evaluation		Continue to work with R&I & NSES to conduct drone & eDNA surveys to gather data at outfalls for mixing zone fish passage evaluation
	Conduct eDNA & macroinvertebrate study	Complete field work	Upon receipt of analytical results, work with CWS departments to develop necessary reports
	Work with WRRD & R&I to conduct focused monitoring of copper & conduct RPA to calculate potential limits	Work with WRRD & R&I to create implementation strategy, develop & apply model & conduct analysis to determine RPA or if additional data collection is needed to determine RPA	Work with WRRD & R&I to create implementation strategy, develop & apply model & conduct analysis to analyze for RP or if additional data collection is needed to determine RP for all parameters before permit renewal
	Partner with R&I to develop copper treatment strategy for FG compliance, evaluate treatment impacts to thermal load & temperature increases		
	Partner with R&I to understand PFAS coming to & leaving WRRFs & develop plan for future regulations, source & fate of PFAS & land application of reuse & biosolids. Develop environmental compliance plan		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Prepare for future permit issues & anticipated limit	Partner with R&I to study watershed & rivers to identify ways to optimize water quality, regulatory compliance & watershed health. Support CWS stormwater strategy development & implementation & conduct studies to support CWS sustainability efforts on climate change, reuse & natural systems		Provide research priorities to R&I to study watershed & rivers to identify ways to optimize water quality, regulatory compliance & watershed health. Support CWS stormwater strategy development & implementation & conduct studies to support CWS sustainability efforts on climate change, reuse & natural systems
	PFAS data assessment 	Develop PFAS compliance report 	Move to ES
EXTERNAL REGULATORY STRUCTURE			
Influence external regulatory structure	Work on long-term compliance planning processes including facilities planning		Develop & implement long-term regulatory compliance strategic roadmap with Strategy Coordination team
	Work with R&I & DEQ to update phosphorus study report & MOA, update phosphorus TMDL & develop aluminum compliance schedule	Work with R&I to provide phosphorus TMDL draft to DEQ	Work with R&I to develop regulatory path to meet competing phosphorus & aluminum regulations
	Continue to work with WRRD O&M, NSES, Oregon ACWA & DEQ to update reuse IMD & policies to support additional beneficial uses & pilot projects. Complete report to DEQ on results of monitoring of Thomas Dairy (GS) & refine monitoring at pilot project 	Work with WRRD O&M & NSES to package information on Thomas Dairy for DEQ to use in update of reuse IMD for guidance in pilot project implementation (GS) & finalize updated reuse IMD & policies that support additional beneficial uses & pilot projects 	
	Create & submit comments on DEQ's Integrated 303(d) Report (anticipating issues with copper, DO, spawning, etc.)	Identify & implement program updates pending final 303(d) list	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Influence external regulatory structure	Evaluate ad hoc rulemakings, TMDLs, policy developments that require CS input & comments		
	Coordinate, research & support scientific studies with DEQ, USGS, TRWC, etc. (e.g., Dairy McKay study)		
STORMWATER PROGRAM DEVELOPMENT			
Mature stormwater program	Conduct critical review of stormwater program elements & identify clear roles & responsibilities for staff, continue to ensure program efforts are aligned	Adaptively manage the stormwater program structure & ensure program efforts are aligned	Adaptively manage the stormwater program, & ensure program efforts are aligned
	Lead update of IGAs with cities & county		Partner with RUSD to continue to update IGAs with cities & county
	Lead adaptive management update of SWMP with co-implementers including critical review of tracking measures & metrics (phase C2)	Create implementation & supporting regulatory structure for updated SWMP	Implement process for updating SWMP with internal departments & the co-implementers
	Work with ES to develop internal stormwater water quality investigation, tracking & reporting process for potential exceedances of WQS. Update Lucity module (2xGS)	Work with ES to adaptively manage the process for investigations, tracking & reporting for potential exceedances of WQS with more co-implementer oversight & enforcement	Work with ES to adaptively manage the process for source control investigations including operational incident response & tracking & reporting for potential exceedances of WQS with more co-implementer oversight & enforcement
PERSONNEL DEVELOPMENT			
Influence external regulatory structure	Implement PDPs, conduct annual update		Update PDPs & meet with management to facilitate goals
	Participation in professional organizations	Identify leadership roles in professional organizations	
	Participate in professional conferences & trainings	Present at professional conferences & trainings & internal Passport events	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Implement & comply with regulatory permits	Performance measure	Ad-hoc compliance (SSO reports) submitted on time	100%	100%	100%	100%
	Service level	NPDES permit renewed & issued	N/A	N/A	N/A	N/A
	Service level	Air quality permit renewed & issued	1	N/A	N/A	1
Specific permit compliance requirements	Service level	Percent of annual reports, compliance reports submitted on time	100%	TBD	TBD	100%
Improved reporting and compliance process management	Service level	Percent of plans, manuals, & guidance documents updated within required permit frequency	100%	TBD	TBD	100%
	Service level	Percentage of annual reports & compliance reports automated or review process streamlined (5 for FY 25/26)	100%	TBD	TBD	100%
Influence external regulatory structure	Performance measure	Percentage of time we're able to submit comment letters (public input, correspondence) on relevant issues	100%	50%	50%	50%
Mature stormwater program	Service level	WQ & IDDE investigations	100%	TBD	TBD	100%

Program Roadmap

Organizational Excellence

Integrated Water Resource Management & Resilient Watersheds



FY24-26



Environmental Services

Environmental Services implements the industrial pretreatment program in compliance with the federal Clean Water Act, including permitting and inspecting significant industrial discharges and managing hauled waste, FOG, local source control, and pollution prevention programs. Environmental Services serves as the Department of Environmental Quality agent for the industrial stormwater permitting and compliance program. The group investigates and responds to customer concerns and complaints about pollution entering waterways or conveyance systems.

Goal

- Provide timely, efficient, and effective environmental services that meet the needs of stakeholders
- Achieve sustainable compliance and meet regulatory requirements while avoiding actions that would put publicly owned treatment works at risk or degrade the water quality of the Tualatin River Watershed

Advantage

- A team with a diverse range of knowledge and skills that understands the complexities of our customers and industries
- Understanding of emerging contaminants and pollution prevention
- Updated foundational pretreatment documents offer guidance, transparency, and effective procedures for implementation
- Understanding of guiding regulations to protect the Tualatin River Watershed

Scope

- Publicly owned treatment works and Tualatin River watershed

Value - Added

- Serves as the Department of Environmental Quality agent for implementing the 1200-Z Industrial Stormwater permit and industrial pretreatment program in compliance with the federal Clean Water Act
- Permits and inspects significant industrial discharges; manages hauled waste, FOG, local source control, and pollution prevention programs. Investigates industrial and commercial sources of pollution and regulates nondomestic waste
- Provides industrial and commercial community engagement
- Responds to customer complaints and impacts on stormwater and water quality

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

1200-Z: Stormwater Discharge General Permit
BMP: best management practice
CCE: Communications & Community Engagement
CS: Compliance Services
D&C Standards: Design and Construction Standards
ES: Environmental Services
FO: Field Operations
FOG: fats, oils, and grease
IDDE: illicit discharge detection and elimination
IGA: intergovernmental agreement
MS4: Municipal Separate Storm Sewer System
NEC: No Exposure Certification
NO: nitrate or nitrite
NO3: nitrate
O&M: operations and maintenance
P2: pollution prevention
PDP: professional development plan
R&I: Research & Innovation
RUSD: Regional Utility Services department
SWMP: Stormwater Management Plan
TPS: Treatment Plant Services
WRRD: Water Resource Recovery Operations & Services department
WQF: water quality facility
WRRF: water resource recovery facility








PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Respond to customer complaints			Deploy incident response training to TPS, FO, O&M & CCE
Achieve pretreatment effectiveness	Collect & review data for new local limits		Review & evaluate data collected for new local limits
	Update nondomestic waste discharge permit application 	Update & implement nondomestic waste discharge permit application 	Update & implement nondomestic waste fact sheet 
	Partner with RUSD to improve initial engagement with customers		
	Improve the industrial survey process & develop internal/external training to improve survey		Implement targeted approach for improved internal/external survey
	Partner with CS, RUSD, FO, & co-implementers to update IGAs regarding IDDE, SWMP, FOG, performance standards, D&C Standards, private WQF & industrial & commercial stormwater facilities		
Resilient staffing & sustainable resources	Mentoring opportunities, career pathways & cross-training opportunities, career advancements	Implement annual ES self-assessment of employee engagement	
Pollution prevention (P2) implementation	Develop criteria to implement outreach program for nonindustrial & commercial sources of PFAS 	Implement outreach program for industrial, commercial & domestic sources of PFAS 	
		Collect & analyze industrial, commercial & domestic PFAS samples from sanitary sources	Collect & analyze industrial & commercial PFAS samples from stormwater sources
		Prioritize locations to monitor PFAS from nonindustrial & commercial sources	
	Develop & implement PFAS Management Plans		Evaluate the effectiveness of PFAS Management Plans

Objective	Initiatives		
	FY 24	FY 25	FY 26
Support troubleshooting of influent nitrate & nitrite loadings at water resource recovery facilities	Partner with R&I & WRRD Operations to identify possible sources of influent NO2/NO3		
	Develop real-time dashboard to evaluate influent flows & loads to the WRRF	Coordinate with R&I to develop continuous monitoring of the conveyance system	
	Permit update & implementation to include additional nitrogen monitoring		
Develop adaptive management for administration of 1200-Z	Implement dashboard as part of annual automated evaluation for risk assessment to determine inspection schedule	Integrate dashboard as part of annual automated evaluation for risk assessment to determine inspection schedule	
	Timely reissuance of NEC for applicable industries		
Proactively administer BMPs for the MS4 permit	Partner with stormwater program coordination team to develop new metrics for SWMP updates for IDDE process & industrial/commercial stormwater programs		
	Adaptively manage stormwater quality investigations based on MS4 monitoring results		
	Improve internal tracking & follow-up to IDDE customer complaints; standardize tracking & documentation	Improve internal tracking & follow-up to IDDE customer complaints; standardize tracking & documentation	
		Improve & update internal tracking & procedures for PWQF program	
		Improve response to illicit discharges & spills to the MS4; develop decision matrix & train internal staff	
		Improve & update internal tracking & procedures for PWQF program	
FOG program implementation		Conduct cross-training with co-implementors to implement a proactive FOG program	
		Continue implementing FOG triage for facility compliance	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actuals FY 23	Estimate FY 24	Estimate FY 25
Respond to customer complaints	Performance measure	Monitor risk to treatment plant operations	100%	100%	100%	100%
	Service level	Develop and publish improved incident response training	Develop training materials	Develop training materials	Develop training materials	Develop training materials
Achieve pretreatment effectiveness	Performance measure	Reissue industrial permits to include local limits, additional monitoring, PFAS management plans	90%	90%	90%	90%
	Performance measure	Priority pretreatment inspections & sampling completed	100%	100%	100%	100%
	Performance measure	Response to incidents of ongoing noncompliance	100%	100%	100%	100%
Develop adaptive management for administration of 1200-Z	Service level	Reissue NEC	90%	25%	90%	90%
	Performance measure	Priority 1200-Z inspections completed	100%	100%	100%	100%

Program Roadmap

Organizational Excellence

Integrated Water Resources Management and Resilient Watersheds



FY24-26



Laboratory Services

The Laboratory Services program is dedicated to providing data of known quality that supports compliance with permit requirements. Our team of experienced scientists uses state-of-the-art technology and adheres to established methodologies and protocols for quality assurance and quality control to ensure the reliability, accuracy, and integrity of data sets. Beyond compliance, the team also provides a range of sampling, analytical, and research support to inform decision-making by all programs at CWS. Critically, the Laboratory plays a crucial role in developing innovative research technologies to optimize resource recovery facility operations and protect people, ecosystems, and the Tualatin River Watershed. Our support for water resource recovery facilities through data provision enables these facilities to optimize their operations and make sound decisions to protect people, ecosystems, and the Tualatin River Watershed.

Goal

- Provide timely, efficient, and effective laboratory services that meet the needs of customers and CWS partners

Advantage

- A highly skilled, collaborative, and adaptable team with a diverse range of knowledge and abilities
- Expertise in various scientific disciplines to support the laboratory's objectives
- Teamwork, integrity, and perseverance to deliver outstanding results
- Dedicated workforce and onsite subject matter experts aligned with the organization's goals and bridging labwork and compliance for regulatory affairs
- Use of advanced instrumentation and continuous development of new methods to ensure accurate and reliable data

Scope

- Support permit compliance, plant operations, stormwater adaptive management, and research and innovation

Value - Added

- Environmental sampling and compliance monitoring
- Expertise and value-added scientific resource
- Data of known quality and transparency
- Method development and onsite real-time monitoring with dedicated staff

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

CS: Compliance Services
ddPCR: droplet digital polymerase chain reaction
FTE: full-time equivalent or full-time employee
EATS: Enterprise Asset & Technical Services
EPA: Environmental Protection Agency
FTE: full-time equivalent or full-time employee
GS: Goal Share, Goal Sharing
LIMS: laboratory information management system
LSC: Local Safety Committee
NTS: Natural Treatment System
PFAS: per- and polyfluoroalkyl substances
PHA: polyhydroxyalkanoate
QA/QC: quality assurance/quality control
R&I: Research & Innovation
RNA: ribonucleic acid
SOP: standard operating procedure



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

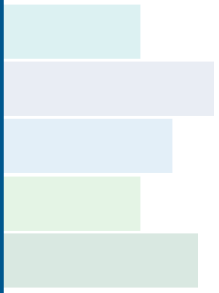
Objective	Initiatives		
	FY 24	FY 25	FY 26
Perform compliance sampling & analysis in a timely manner	Establish action plan & implement recommendation from Lab team retreat & Gallup survey results: Assessing the way we work – Improving & balancing work environment by auditing workflows		Staff-derived recommendations for improved workflow management
	Adaptive management of NTS in accordance with Operations Plan	Establish action plan & implement recommendation from Lab team retreat & Gallup survey results: Assessing the way we work – increase depth through more training (sampling)	Develop site-specific SOP for NTS monitoring
	Partner with CS to expand staff operational capacity & depth of training to support compliance tracking	Expand staff operational capacity & depth of training to support key priority area	Increase depth through training in metals & PFAS analysis
	Review & improve the process of after-hours sampling & analysis & recognition of outcomes		Develop comprehensive resource for lab incident response to most common issues
Provide ambient water quality monitoring & sampling	Collaboration & cross-training to improve & optimize business continuity		Review & update procedures & document in new SOPs
	Contract vendor for training staff on field sampling methods & instrumentation		Implement new technologies to optimize sampling
Formalize workplace procedures including safety	Establish procedures for best practice resolution & agreement of SOPs	Implement SOP recommendations	Annual review & update of current SOPs
		Implement optimized workflow & monitor for improvement	Monitor workflow & make adjustments for continual improvement
	Streamline safety program through consistent practices & procedures		Implement recommended action items on safety improvements

Objective	Initiatives		
	FY 24	FY 25	FY 26
Formalize workplace procedures including safety		Conduct multiple workshops & trainings to understand & optimize workflow between internal customers & Lab	Review procedures for incidence response & work with CWS partners on improvements
	Increase workforce resiliency & flexibility of schedule with training on new methods & procedures		Increase crossover between sampling crew & analytical team to allow for more flexible scheduling
Conduct special projects & method development	Develop PFAS methodology & commission lab equipment & initial method validation	Implement PFAS monitoring & increasing PFAS training	Conduct PFAS monitoring
	Train staff on EPA coliphage methods		Conduct research to bring Q-beta coliphage online for improved quantification on R&I ddPCR method
	Create data management & tracking for coliphage data in LIMS including QA/QC protocol	Optimize PHA method on new instrument & increase depth through training	
	Cross-validate EPA coliphage method with in-house R&I program RNA method (partner with R&I)	Craft input for EPA pending development of virus disinfection & water quality criteria	
			Plan for ripl move: Identify relocation team & assign responsibilities, build timeline



Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Perform compliance sampling & analysis in a timely manner	Performance measure	Meet expectations and schedule for Gallup action plan	80%			85%
	Service level	Number of compliance determinations per FTE	3,200	3,500	4,400	3,900
	Performance measure	Meeting scheduled permit requirements	100%	100%	100%	100%
	Performance measure	Meeting scheduled internal request requirements	100%	95%	100%	100%
	Performance measure	Treatment plant sampling completed	100%	100%	100%	100%
	Performance measure	Required industrial	100%	100%	100%	100%
Provide ambient water quality monitoring & sampling	Service level	Number of staff cross-trained to support ambient water quality monitoring and sampling (increasing analytical range of staff)	4	6	4	3
	Service level	Number of ambient analytical results per FTE	3,190	1,120	1,350	4,100
	Service level	Number of compliance determinations per FTE	300	300	300	300
Formalize workplace procedures including safety	Service level	SOPs reviewed	100%		104 (100%)	100%
	Performance measure	Third-party performance testing analysis	100%	100%	100%	100%
Conduct special projects & method development	Service level	Number of staff cross-trained on research methods	2	1	1	2
	Service level	Average number of special projects per project manager	6	6	8	7



Water & Engineering Technology Department



FY24-26

WET

Water & Engineering Technology

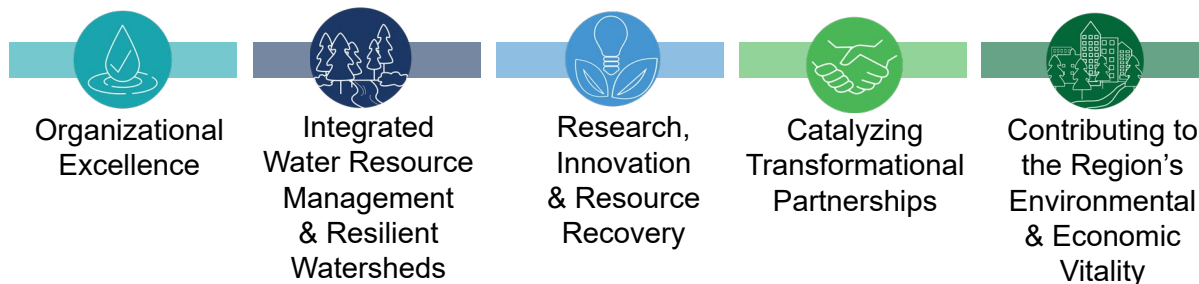
Full-time employees: 80

Departmental operating budget: \$15,218,200

The Water & Engineering Technology department has several key areas of responsibility:

1. **Capital Planning:** Staff members develop master plans that ensure the conveyance and treatment systems are strategically positioned to meet regulatory and growth demands within the East and West basins, manage integrated projects that span multiple departments and stakeholders, and prioritize asset and inflow and infiltration renewal and replacement projects. Capital Planning is also responsible for the CWS' Capital Improvement Program and provides easement and environmental permitting support services.
2. **Capital Project Delivery:** Staff members provide design, delivery, and construction support services for CWS' conveyance, pump station, and water resource recovery facilities. These functions are supported in the Conveyance Engineering, Treatment Plant Services, and Construction Support Services programs.
3. **Research and Innovation:** Staff members develop analytical methods and models to optimize regulatory compliance strategies. They support operations to enhance the reliability and effectiveness of treatment processes and develop new technologies to enhance the watershed, address regulatory issues, and reduce costs.

Key Strategic Outcomes (KSO):



Abbreviations

AI: artificial intelligence
 CIP: Capital Improvement Program
 EBMP: East Basin Master Plan
 K: thousand
 RAD: Regulatory Affairs department
 sani: sanitary
 WBMP: West Basin Master Plan
 WET: Water & Engineering Technology department
 WRRF: water resource recovery facility















PE Strength & Opportunities














Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Sanitary & storm rehabilitation projects CIP	\$7,500,000	\$5,457,300	\$13,077,000	\$13,674,000
Pump station projects CIP	\$32,000,000	\$3,850,000	\$5,580,000	\$8,755,000
Durham WRRF projects CIP	\$14,500,000	\$9,098,900	\$8,255,000	\$11,876,000
Rock Creek WRRF projects CIP	\$16,600,000	\$21,623,600	\$11,915,000	\$14,492,000
Forest Grove WRRF projects CIP	\$10,850,000	\$6,284,000	\$18,620,000	\$30,650,000
Hillsboro WRRF projects CIP	\$1,100,000	\$795,000	\$4,250,000	\$546,000

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Rehab sani & storm projects \$100K or larger	10	14	16	13
Treatment & pump station fund 112 projects \$100K or larger	34	35	40	37
Percentage of conveyance & treatment project actual to planned capital expenditure	90%	75%	80%	108%

Objectives	Initiative Statements	KSO
Manage East Basin & West Basin CIP	Administer, plan, design & manage construction of CWS' CIP for the East Basin (tributary to the Durham facility) & West Basin (tributary to the Forest Grove, Hillsboro & Rock Creek facilities). Plan & deliver projects using an integrated approach that will leverage collective understanding of the project & optimize outcomes.	
Utilize a science-based approach to address compliance Issues	Administer, plan, design & manage construction of CWS' CIP for the East Basin (tributary to the Durham facility) & West Basin (tributary to the Forest Grove, Hillsboro & Rock Creek facilities). Plan & deliver projects using an integrated approach that will leverage collective understanding of the project & optimize outcomes.	
Construct projects to deliver design intent & provide best value	Use an integrated approach between the operations, design & construction teams so projects are delivered efficiently, on time & with the maximum benefit.	
Conveyance system rehabilitation	In accordance with planning efforts, condition assessments & flow monitoring programs, rehabilitate parts of the conveyance system to reduce infiltration & inflow & preserve capacity.	
Conduct environmental permitting & easement acquisition programs for CWS	Develop & staff CWS environmental permitting & easement acquisition programs that will provide a consistent approach to acquiring permits & easements & strategic support for project planning & development.	
Support CIP	Develop & deploy a capital planning tool for the EBMP & WBMP.	
	Develop standardized budgeting & prioritization processes.	
	Update or replace software tools.	
Evolve CWS' use of AI & machine learning	Develop a data management master plan.	
	Identify & implement instrumentation systems to integrate collection, treatment & watershed monitoring.	
Develop CWS' beneficial use of biogas	Implement a biogas utilization strategy at Rock Creek WRRF	
	Develop tools to evaluate external feedstocks for enhancing biogas production	

Objectives	Initiative Statements	KSO
TECHNOLOGY DEVELOPMENT & RESEARCH		
Support CIP projects	Develop & deploy a capital planning tool for the East & West Basins during the WBMP effort.	
Increase understanding of biological phosphorus removal stability	Develop & conduct BPR stability monitoring using instrumentation, bioassays & laboratory analysis.	
Define current & future WRRD instrumentation needs	Evaluate existing instrumentation resources & maintenance needs & develop implementation plan for future instrumentation additions.	
Increase understanding & monitoring of digester stability	Develop metrics & instrumentation to prevent digester instability & to properly load digestion processes for maximum benefit	
Develop copper treatment strategy for Forest Grove compliance	Project effluent copper concentration based on options including primary treatment, chemical addition & source management.	
TREATMENT PLANT SERVICES		
Efficient & effective construction CIP projects	Anticipate potential changes early in the project & resolve as quickly as possible to minimize cost implications.	
	Engage plant staff & incorporate their suggestions to maximize the value & utility of all improvements.	
	Leverage advances in 3D-scanning to develop accurate models of each WRRF. Design CIP projects as 3D models.	
Utilize advanced analysis & design modeling tools	Develop tools to document treatment capacities. Provide liquid stream process (e.g., SUMO) & hydraulic (e.g., visual hydraulics, Fathom) models that document & inform treatment capacities & limitations.	
	Continue to expand our understanding of seismic resilience & climate change & apply that knowledge to develop an appropriate level of risk mitigation.	
Maximize project value by obtaining staff Input	Obtain input for O&M and EATS staff during design of capital projects to optimize process efficiency and minimize construction changes.	



FY24-26



Capital Planning

The Capital Planning group leads the development of sanitary master plans, continuously monitors the region's growth, plans the renewal and replacement of stormwater and sanitary conveyance system infrastructure, and collaborates with CWS departments and partners to produce and strategically adjust the five-year Capital Improvement Plan. The Capital Planning team collaborates with local, state, and federal regulators; supports CIP project regulatory compliance; and secures land and easement rights for project implementation.

Goal

- Provide permitting and property acquisition services supporting capital project delivery across CWS
- Align regional and local infrastructure needs to meet capacity demands, management of infrastructure assets, regulatory requirements, and strategic investments across CWS

Advantage

- Talented workforce that is forward-thinking, strategically minded, and committed to supporting capital project planning and delivery across CWS

Scope

- Alignment of Capital Improvement Program development and documentation across all departments responsible for delivering CWS capital projects

Value - Added

- Systematic and consistent documentation of CIP projects across departments to develop the five-year CIP
- Environmental permitting support for capital projects
- Easement acquisition services for capital projects
- Horizontal asset repair and replacement analysis and planning

Abbreviations

CIP: Capital Improvement Program/Plan

CP2: Capital permitting focus area

EBMP: East Basin Master Plan

FY: fiscal year

GFOA: Government Finance Officers Association

I&I: inflow and infiltration

NSES: Natural Systems Enhancement & Stewardship department

POE: permit of entry

R/R renewal or replacement

sani: sanitary

SDC: System Development Charge

SOP: standard operating procedures

SWM: surface water management

TPS: Treatment Plant Services Engineering

WBMP: West Basin Master Plan

WET: Water & Engineering Technology department

CWS Values

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We're guided by science.

We make great things happen by working and solving problems together.



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Coordinate CIP project permitting	Continue to prepare & provide oversight on permit applications supporting projects	Identify & track milestones related to CIP project permitting	Complete CIP project permitting milestones by scheduled due date
		Identify project delivery operations requiring SOPs	Develop CP2 SOPs & integrate SOPs into NSES project delivery, WET Conveyance Engineering & WET TPS Engineering CIP project delivery operations
	Refine business strategy with Environmental Permit Review team	Conduct outreach to capital project implementation teams	Provide CIP projects with standardized permit strategy documentation structure & process
Land & easement acquisition	Hire Senior Easement Acquisition Specialist, and familiarize with active projects	Actively manage acquisitions and consultants	Develop a plan to review & update land acquisition policies & processes to support project delivery
Sanitary master planning	Lead West Basin Conveyance Master Plan (WBMP) & coordinate with Facilities Plan	Incorporate WBMP into 10-year Capital Improvement Plan (CIP)	Develop plans to track conveyance project flow triggers identified in EBMP & WBMP
Infrastructure renewal / replacement planning	Continue to consider existing infrastructure condition during capacity assessments	Identify R/R projects and I&I abatement projects for FY27-29	Hire new Principal Engineer to begin developing R/R program & prioritize I&I abatement projects
Enhance CIP development	Enhance comprehensive CIP overview during budget development	Converge budgeting with actual spending	Commence pilot quarterly progress tracking system for top 10 CIP projects
Address GFOA recommendations in capital planning		Develop plan to incorporate GFOA capital budget recommendations	Commence action plans developed in FY24-25 for GFOA capital budget recommendations
CIP financial planning	Level annual CIP fluctuation in 5-yr plan	Determine 20-year SDC-eligible costs from EBMP & WBMP	Collaborate with Strategy Development program & Finance to plan SDC study

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Coordinate CIP project permitting	Service level	% of original CIP project permitting milestones met	100%		10	40
	Service level	% of CP2 focus area CIP project delivery operations supported through SOPs	100%		5	20
	Service level	% of CIP projects with permit strategies	100%		20	40
Land & easement acquisition	Service level	# of anticipated easements supporting capital projects needed	159		77	159
	Service level	# of easements obtained	110		60	110
	Performance level	% of required easements obtained	69		78	69
	Service level	# of anticipated POEs supporting capital projects needed	78		268	78
	Service level	# of POEs obtained	65		200	65
	Performance level	% of required POEs obtained	83		75	83
Address GFOA recommendations in capital planning	Service level	# of unfulfilled CIP-related GFOA recommendations	35	45	3,542	35
	Performance level	Percentage of unfulfilled CIP-related GFOA recommendations met	70%	90%	70% 85%	70%
CIP planning	Performance level	% of unfulfilled CIP-related GFOA recommendations met	90%	100%	85%	85%
	Performance level	Maximum 1-year percentage budget difference from forward-looking 5-year average	10%	15% 42.8%	10% 16,7%	15%



FY24-26



Construction & Engineering Services

We directly manage construction work to ensure District Capital Improvement projects are built in a safe and timely manner; follow applicable codes and permits, are consistent with technical plans and specifications, and are delivered within industry-accepted budget metrics. Additionally, we accomplish these objectives by minimizing adverse impacts or outcomes to residents, businesses, and the public-at-large. Our work delivers sustainable public infrastructure which protects public health, safety, water quality, and natural resources. In this manner our work directly promotes core values of responsible natural stewardship and financial accountability.

Goal

- Construct capital projects utilizing innovative, efficient, and effective engineering practices
- Deliver informed project management and construction solutions to affected stakeholders
- Consistently deliver projects on-time and within accepted budget metrics

Advantage

- In-house engineers and coordinators with project ownership and accountability
- A culture of collaboration and knowledge-sharing across departments and teams
- Executive sponsors are engaged and committed to the success of capital projects
- Clearly defined decision-making authority and responsibility for different stages of capital projects enables efficient project delivery
- Combined experience and success in delivering capital projects
- Holistic engagement with O&M and other “internal clients” to support construction and commissioning of capital projects

Value - Added

- Building assets and infrastructure to meet anticipated growth and regulatory compliance
- In-house evaluation and assessment of new and existing technology
- Engineering decision-making and solutions for sustainable capital project budgeting

Abbreviations



PE Strength & Opportunities



Goal Sharing measure

CWS Values

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Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Establish Document Acceptance/transfer Protocols			Work with Conveyance & TPS to establish written SOP for the transition & handoff of documents from design to the construction phase
			Develop a Design Review SOP with Conveyance & TPS to codify the expectations & input for formally reviewing plans and specifications as the design phase advances. Currently one doesn't exist
Refine & Improve Procore implementation user experience			Integrate the financial module to track payments & track financial trends
			Refine workflows for Change Orders to be fully electronic & not rely on printed copies for final execution
			Establish a steering committee to guide Procore implementation & use
			Refine existing document file storage matrix to make more user friendly & efficient
Resilient staffing & sustainable resources			Provide mentoring opportunities, career pathways & cross-training opportunities, career advancements previously not offered to staff

Objective	Initiatives		
	FY 24	FY 25	FY 26
Fill vacancies and add staff to meet current & future needs			The Construction Group is currently understaffed due to retirements & departures. These positions need to be filled & new ones added to meet the demands of the growing capital improvement budget & projects desired to be built
Integrate permitting compliance & tracking into capital project delivery			<p>Work with Capital Permission to ensure permits are properly identified, tracked & documented during the construction phase of projects</p> <p>Ensure permits are stored in a central location in Procore for all stakeholders to readily access</p>

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-25



Conveyance Engineering

Conveyance Engineering uses its collective experience and expertise to efficiently deliver capital projects that address the needs of the sanitary, reuse, and stormwater conveyance systems. This ensures urbanized Washington County has sufficient capacity to grow and thrive and that CWS is meeting its thermal compliance strategy with recycled water. Projects are delivered in coordination with internal and external stakeholders, including other CWS departments, partner cities, and government agencies.

Goal

- Timely, efficient, and effective services that meet the needs of stakeholders

Advantage

- Talented workforce that is forward thinking, responsive, pitches in to help each other out, acts as a bridge between work groups, and partners to collaboratively work to solve problems and resolve issues in a timely manner

Scope

- Sanitary and storm sewer conveyance systems and water quality facilities in the CWS service area

Value - Added

- Plan and design infrastructure
- Maintain existing infrastructure
- Enable development
- Convey sanitary, recycled water, and stormwater
- Compliance with plans and specifications
- Risk management

Abbreviations

ABC: Administration Building Complex
CE: Conveyance Engineering
EBMP: East Basin Master Plan
FO: Field Operations
HR: Human Resources department
I/I: inflow and infiltration
KC: King City LID: Local Improvement Districts
MP: master plan
ODOT: Oregon Department of Transportation
PDP: professional development plan
PS: pump station, pump stations
RD: Reimbursement Districts
ripl: Research+Innovation+Partners+Labs
RUSD: Regional Utility Services department
WBMP: West Basin Master Plan

CWS Values

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PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 23	FY 24	FY 25
LEARNING & GROWTH			
Improve workforce development	Draft PDPs	Review & update PDPs	
	Deploy annual conference participation plan		
	Recognize and celebrate outstanding achievements		
PROJECT PLANNING & DELIVERY: WEST BASIN			
Administration		Implement WBMP	
Planning	Bull Mountain/KC forecasting	WBMP projects	
	Aloha PS upgrade and I/I	Council Creek PS	
	Gaston PS upgrade		
Design	Dawson Site D	Rosedale PS	Broadmore rehabilitation
	Quail Valley PS	RIPL Gravity Line	Foothills Park capacity upgrade
			Quail Valley PS
Construction	North Plains PS upgrade	Dawson Site D	
		LID and RD projects	
EAST BASIN			
Administration	Implement East Master Plan		
Planning	Metzger Trunk/Ash Creek		
	Fanno Creek projects approach		
	Identify next project & approach		
Design	Brookman Trunk	Metzger Trunk/Ash Creek	
	Cooper Mountain PS	Fanno interceptor rehab	Fanno solutions
		Tonquin PS	Cooper Mountain PS
Construction		Brookman Trunk	
	Cedar Hills I/I Phase 3		
ADMINISTRATION			
Data management	Sort & categorize CE data on network	Identify appropriate locations for all categories of data	Identify storage & filing locations for documents stored on 3rd floor at ABC

Objective	Initiatives		
	FY 23	FY 24	FY 25
Facilities planning and modifications			Plan move to CWS Central 3rd floor
Recruitment & retention	Identify and coordinate Human Resource needs, update 5-year staffing plan		Update staffing plan
			Recruit staff

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Administrative	Performance measure	Employees attending Passport tours	4	4	4	4
	Performance measure	Gallup Employee Engagement mean response score for CE	Increase scores		Increase from June 2022 score	Increase scores from 2024

Program Roadmap

Organizational Excellence

Research, Innovation, & Resource Recovery



FY24-26



Research & Innovation

Research & Innovation & serves CWS, the Tualatin River Watershed, and community by developing advanced methods, practical technologies, and data-driven solutions to meet regulatory challenges, optimize operations, and improve the quality of our services. R&I provides leadership in the water industry through transformative partnerships, creative and cost-effective solutions, and impactful science communications.

Goal

- To achieve an ideal state of water resource recovery where treatment processes are highly efficient, sustainable, and innovative — achieving maximum water quality improvement with minimal environmental impact and resource use.

Advantage

- Multidisciplinary team of experts embedded within utility operations
- State-of-the-art instrumentation
- Organization customer service excellence
- National and international network of academic, industry, and utility partnerships

Scope

- Applying research, technology, and innovative methods to solve CWS challenges

Value - Added

- Ensure long-term regulatory and operational compliance
- Support engineering and operations troubleshooting and data-driven decision-making
- Evaluate and implement emerging technologies and analytical techniques
- Modeling systems for scenario planning and risk mitigation
- Advancing industry understanding of treatment processes
- Potential to incubate new technologies and services for the industry

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Abbreviations

1200-Z: Stormwater Discharge General Permit
6PPD: a chemical used to prevent tires from breaking down
6PPD-Q: 6PPD-quinone, toxic chemical formed when 6PPD reacts with ozone in the air
AB1-5: aeration basin
ACWA: Association of Clean Water Agencies
AOF: adsorbable organically bound fluorine
BPR: biological phosphorus removal
CIP: Capital Improvement Program
COD: chemical oxygen demand
CST: capillary suction time
CUOO: chief utility operations officer
DBP: disinfection byproducts
DCM: digital control module
ddPRC: droplet digital polymerase chain reaction
DEQ: Department of Environmental Quality
DM: Durham
DNA: deoxyribonucleic acid
DO: dissolved oxygen
DS: Digital Solutions
eDNA: environmental DNA
EPA: Environmental Protection Agency
ES: Environmental Services
ETO: Energy Trust of Oregon
eWASSTRIP: emancipative Waste Activated Sludge Stripping to Remove Internal Phosphorus
FEQ: flow equalization
FG: Forest Grove
FTIR: Fourier-transform infrared spectroscopy
GHG: greenhouse gas
I/I: inflow and infiltration
IPCC: Intergovernmental Panel on Climate Change
IPS: influent pump station
MAO: Memorandum of Agreement
mg/L: milligram per liter
MH: manhole, maintenance hole
ML: machine leaning
MP: microplastic
MS4: municipal separate storm sewer system
MSDS: material safety data sheet
MST: microbial source tracking
NH4: ammonia
NO2: nitrite
NO3: nitrate
NPDES: National Pollutant Discharge Elimination System
NTS: Natural Treatment System
O&M: operations and maintenance
Ops: Operations

OSHG: onsite sodium hypochlorite generation
 OSU: Oregon State University
 PEPS: primary effluent pumping station
 PFAS: per- and polyfluoroalkyl substances
 PHA: polyhydroxyalkanoate
 QC: quality control
 RAD: Regulatory Affairs department
 RC: Rock Creek
 R&I: Research and Innovation
 RNA: ribonucleic acid
 RT-ddPCR:
 SOP: standard operating procedure
 SPC: surrogate (or sample) processing control
 SW: stormwater
 TBD: to be determined
 TEMPEST: terrestrial ecosystem manipulation to probe the effects of storm treatments
 TMDL: total maximum daily loads
 TOP: total oxidizable precursor
 TP: total phosphorus
 TPS: Treatment Plant Services
 TR: Tualatin River
 TREE: Tualatin River Environmental Enhancement
 TRUST: Tualatin River Urban Stormwater Tool Software
 TRWC: Tualatin River Watershed Council
 TSS: total suspended solids
 USGS: U.S. Geological Survey
 WBMP: West Basin Master Plan
 WQ: water quality
 WQL: Water Quality Lab
 WRF: Water Research Foundation
 WRRD: Water Resource Recovery Operations & Services department
 WRRF: water resource recovery facility



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
CAPITAL IMPROVEMENT PLAN SUPPORT			
Develop & Deploy a Capital Planning Tool for the East and West Basins during the West Basin Master Plan effort	Develop capital planning tool for West Basin as part of the WBMP	Complete development of capital planning tool for West Basin as part of WBMP	
Industrial coordination	Monitor industrial flow & load projections & ongoing contributions		
	Respond to discharge request evaluations		
	Assist ES with industrial discharge troubleshooting	Assist ES with industrial discharge troubleshooting and laboratory testing as needed	
In-DENSE pilot		Install pilot system on Basins 6&7	Evaluate success of the In-DENSE pilot
			Design permanent In-DENSE system
Provide design & start up guidance for capital improvement projects	Annual debrief of projects		
	Routine TPS coordination meeting		
	Update CIP prioritization		
OPERATIONS SUPPORT			
WRRD instrumentation program management	Develop and manage implementation plan for current and future instrumentation		
	Collaborate with multiple stakeholders to ensure staffing is adequate to support instrumentation		
	Create and deploy data quality management systems		
Provide process guidance & optimization	Collaborate with process analysts to troubleshoot process issues and optimize systems		
NTS evaluation & regulatory compliance	Collaborate to implement continuous monitoring	Develop enhanced monitoring to characterize TSS within NTS. Evaluate data to improve TSS	Evaluate additional data to improve TSS mitigation strategy and assist RAD as needed

Objective	Initiatives		
	FY 24	FY 25	FY 26
NTS evaluation & regulatory compliance	Evaluate temperature & DO performance under new NPDES permit; evaluate water quality & operational data to improve TSS mitigation strategy	Evaluate TSS, turbidity, chlorophyll data to improve TSS mitigation strategy	Refine monitoring & response strategies
	Refine continuous & discrete monitoring strategies & response framework	Refine monitoring & response strategies	Coordinate with RAD on permit renewal
	Collaborate on planning and implementation of electronic rounds documentation pilot	Collaborate on e-rounds implementation & refinement	
	Update NTS Operations Plan		
		Coordinate with RAD on permit renewal	
		Coordinate on effluent pump station/upgrades discussion & design	
Data Management Master Planning	Deliver first phase of planning effort		
		Scope & contract the second phase of the project	Deliver second phase of the project
Support troubleshooting of influent nitrate/nitrite loadings at Treatment Facilities	Work with WRRD operations & ES to identify possible sources of influent NO2/NO3		
	Work with operations to develop strategies to mitigate the detrimental impacts of influent NO2/NO3		
Coordinate filter operation across Rock Creek & Durham	Develop test plans for full & pilot study RC	Execute full scale study at RC, full-scale study at DM	
		Evaluate filters through sampling, troubleshoot solutions & implement modifications to impacted filters	
Flow EQ	Evaluate data with ETO & IPS programming, implement IPS programming to max time and level	Acquire and install PEPS power monitoring. PEPS programming & trials. Project closeout and rebate issue.	Develop DM FEQ pilot plan & proposal

Objective	Initiatives		
	FY 24	FY 25	FY 26
Chemical resiliency	Data gathering & risk analysis workshops. DM OSHG predesign. Inventory ideas for opportunities workshop	Risk analysis draft report, draft contingency plans, opportunities workshop. Final reports, presentations & project closeout	
RESEARCH FOR REGULATORY COMPLIANCE			
Develop copper treatment strategy for Forest Grove compliance	Review impact of source control measures & results of full-scale pilot tests	Review impact of source control measures	
	Evaluate & vet projections		
	Conduct additional testing as needed		Develop testing plan & evaluate impact of primary clarifiers at Forest Grove
Develop program to evaluate treatment impacts to thermal load & temperature increases	Collect temperature profiles at DM and RC to calibrate models. Plan for weir cooling pilot	Weir cooling pilot. Monitor & model Marine Park facility. Develop TEMPEST model for theoretical section of collection system.	
Develop testing program to describe fate of phosphorus in the NTS		Evaluate potential for short- & long-term increases in NTS effluent phosphorus	
		Conduct follow-up sediment sampling & seasonal water profiles	
	Establish procedures for sediment phosphorus characterization	Formalize ongoing annual sampling schedule and procedures with WQL	Refine long-term monitoring strategy
	Conduct baseline sediment measurements & seasonal water profiles	Evaluate potential intermediate sampling location	Conduct baseline sediment measurements
	Conduct bench tests to evaluate potential for nutrient desorption from wetland soils	Develop recommendations based on phosphorus projections; continue research as needed	
Support update of phosphorus TMDL & aluminum limit development	Conduct seasonal testing (per MAO 2.0) at effluent TP of 0.4 mg/L and 0.3 mg/L to evaluate relationship between alum dose & effluent aluminum		Testing TBD based on MAO 3.0

Objective	Initiatives		
	FY 24	FY 25	FY 26
Support update of phosphorus TMDL & aluminum limit development	Document MAO testing results for DEQ report		
	Plan and conduct filter pilot to inform capital planning options	Conduct filter pilot	
	Coordinate with RAD on evaluating & documenting internal capital and O&M impacts of 0.5 mg/L vs. <0.5 mg/L TP limits		
	Coordinate with RAD on regulatory gap tool (MAO 3.0)		
Operational testing to support BPR stability	Develop, conduct & interpret bioassays for BPR operational understanding		
	Deploy sensors to support BPR stability		
Digital Twin for BPR stability (WRF 5121)	Develop and deploy digital twin soft sensor to predict influent & primary effluent orthophosphate loads	If accurate, test alum dosing recommendations for primary effluent orthophosphate load control	
	Refine & evaluate accuracy of soft sensor for operational support	Summarize results & lessons learned for internal & external stakeholders	
MAIA Water: digital innovation platform			Kick off the MAIA platform initiative. Develop prototype of chemical management application
Improved understanding of carbon impacts on BPR stability	Develop systematic approach to evaluating the carbon balance needed to maintain BPR stability		Summarize key findings related carbon balance & PHA research & determine how data can best support long term BPR operation
	Deploy routine PHA monitoring to improve fundamental understanding of BPR stability		
DNA and RNA methods to understand BPR stability	Collaborate with Blythe Layton & Rachel Golda to determine appropriate targets for ddPCR assay development		
Evaluate alternative operating modes for improved BPR stability	Document performance of AB5 compared to AB1-4 for BPR stability	DM: Document performance AB1 with larger anaerobic zone/smaller anoxic zone compared to AB2-4 & AB5	Develop recommendations for implementation of swing zones and/or low DO operation to support BPR stability at DM

Objective	Initiatives		
	FY 24	FY 25	FY 26
Evaluate alternative operating modes for improved BPR stability		RC: Evaluate performance of step feed configuration vs. A2O	RC: Develop recommendations for basin configuration modifications
DBP mitigation testing & modifications		Develop testing plan & identify potential modifications to limit DBP formation	Execute modifications to system & demonstrate “no reasonable potential” for DBP formation
DIGESTION RESEARCH PROGRAM			
Increase understanding & monitoring of digester stability	Employ routine monitoring and testing to identify causes of digestion instability	Deploy routine testing/monitoring when suspected risk of digester failure and provide feedback to operations	
	Provide guidance and support to operations		
Develop co-digestion product evaluation	Develop & implement testing procedure for routine evaluation	Research improvements to testing procedure	Continue to evaluate co-digestion sources & provide feedback to Operations
	Evaluate & rank potential co-digestion sources for RC		Evaluate impact of operational changes on gas recovery
	Provide continuous feedback to Operations, management	Provide continuous feedback & support to Operations, management	Conduct further testing on substrates & analyze digesters for genomic differences
SOLIDS PROCESSING RESEARCH PROGRAM			
eWASSTRIP	On hold	Evaluate potential benefits based on laboratory testing. Prepare a potential full-scale testing plan	Discuss eWASSTRIP with Ostara and conduct full-scale testing as needed
Solids processing dewaterability	CST method development and testing to correlate with polymer aging and dosing		Document results of CST testing
Nanobubble impact on dewatering polymer activation		Design test plan & study impacts of nanobubbles on dewatering polymer activation	Implement permanent nanobubble system based on testing results

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADVANCED MONITORING PROGRAM			
Develop the ability to produce low-cost, reproducible & fully reliable data without excess maintenance	Refine rag guard		Further refine rag guard
	Develop initial data management system for visualization & user acceptance testing	Develop work & test data logger from one manufacturer	Test selected data logger type & expand install locations
	Develop an initial draft SOP		Update SOP for new data management/visualization system
	Support development of Meadow board w DS		Test/refine data management system
	Support development of initial WQ portal, data management & asset management system	Test and implement new battery & case	
Expand number of analytes, locations & make scalable & shareable	Test out NO3 sensors, level sensors, COD/NH4 sensors & WQ sondes	Test out sensors in new applications like NTS, USGS, collection system	
	Refine key MH & install sensors at more locations	Add/test new analytes as needed	
	Refine FTIR method for GHG and mystery gas sensing		Develop GHG analysis methods for treatment facility applications
Use sensors to solve CWS problems & develop ability to consult for others		Install NO3 sensors in DM collection system to track source	
	Apply FTIR to solve mystery gas at Dawson Creek pipeline	Collect GHG samples from WRRF processes	
		Work with RAD to solve mystery gas at Dawson Creek	
	Install sondes at Butternut Creek	Replace all Dairy Creek sensors with sondes	
	Install level sensors at Fanno	Install sensors at Carpenter Creek	Install sensors at new locations as required
	Install sensors at Thomas Dairy	Expand, adjust sensors at Thomas Dairy & other reuse sites	Install sensors as needed for Davis Tool application site

Objective	Initiatives		
	FY 24	FY 25	FY 26
INFORM EMERGING CONTAMINANTS STRATEGY			
Understand PFAS coming to and leaving WRRFs & potential treatment effectiveness	Track and analyze PFAS in inf/eff/biosolids over tim		
	Conduct TOP analysis on inf/eff/biosolids	Sample between processes within WRRFs	
		Targeted sampling campaigns & experiments on sampling methodology	
		Conduct additional TOP analyses	
	Track treatment technology developments		
Track down & mitigate sources of PFAS in sewershed and watershed	Measure/document progress in PFAS reductions by focus industries		
	Dominant sector mass balance	Track other sources through collection system	
	Ambient sampling	Widespread sampling of industries	
	Urban creek sampling	Quantify PFAS in MS4, 1200-Z, and ambient, background, and source water and soils	
	Background sampling		Background sampling
Understand the fate of PFAS in land application of reuse & biosolids & plan for coming regulations	Further characterize PFAS in soil & groundwater from locations of biosolids and reuse application		
		Conduct fingerprint, tracer & other studies for identifying sources for these areas	
		Characterize rainwater & aerial deposition near these sites	Continue source tracking studies for reuse & biosolids sites
		Design & construct test beds	Begin experiments on test beds at Meriwether
Develop ability to measure PFAS & other fluorinated compounds in-house	Complete hiring & build the lab	Develop in-house methods for TOP/AOF (EPA 1621)	
	Develop in-house methods for PFAS using 1633 in surface water, wastewater, groundwater, soils & biosolids	Develop in-house methods for vegetation	
		Develop plan for running external samples	
	Add additional forms of PFAS as standards become available		
Prepare for & help shape coming PFAS regulations	Participate/lead ACWA efforts with legislature, experiments, comment letters, etc		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Prepare for & help shape coming PFAS regulations	EPA, OSU & other study participation	WRF & other study participation	
	Track regulatory developments		
Track emerging contaminants & develop ability to measure in-house to support CWS' preparedness for coming regulations	Track literature & identify emerging contaminants of concern		
	Obtain needed standards & determine methods for 6PPD & wastewater tracers	Develop in-house methods for 6PPD	Track 6PPD-Q/6PPD within the watershed, sewershed, stormwater & help prepare for future regulations
	Create a study plan to sample 6PPD in stormwater/watershed	Collect samples & study 6PPD in stormwater	Collect samples & study 6PPD from industries & commercial entities
			Develop in-house methodology for tracers
			Develop additional methods for emerging contaminants in-house
SUPPORT CWS PRIORITIES			
Study watershed & rivers to identify ways to optimize water quality, regulatory compliance & watershed health at lowest cost	Support report to DEQ to enable update the phosphorus TMDL	Work with DEQ to update the phosphorus TMDL	
	Study Hagg ML for release optimization	Test ML model suggestions for optimization of Hagg Lake releases	Perform validation testing of ML model for optimization of Hagg Lake releases & update as necessary
	Study influent temperature		
	Continue support of Dairy Creek, temperature strategy & other projects		
	Understand how upstream water quality & hydrologic conditions result in poor water quality events downstream	Support permit renewal analyses	
Support CWS stormwater strategy development & implementation for water quality, hydromod & infrastructure difficulties	Help roll out & train TRUST 2020		
	Support SW strategy development		
	Refine heat map for MS4 monitoring support	Support MS4 model development & monitoring locations	
		Conduct monitoring studies (including emerging contaminants of concern)	
	Conduct hydrologic, hydraulic & modeling as needed to support conveyance & development projects as needed		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Conduct studies to support CWS sustainability efforts on climate change, reuse & natural systems	Collect extensive data from NTS to support model development	Conduct NTS modeling & monitoring to support operation optimization	
	Support reuse pilot studies with modeling and monitoring		
	Conduct modeling & monitoring for carbon footprint and sequestration	Conduct modeling & monitoring for carbon footprint (inside the fence) & sequestration	
	Participate in the US Water Alliance effort to generate guidelines for carbon footprints		
	Support downscaled climate model development	Apply DCM predictions to wq models to predict effects of climate change and support planning	
	Sensitivity analyses on climate variables on Tualatin WQ		Sensitivity analyses on climate variables on Tualatin WQ as DCM is available
	Study reuse valuation & support master plan		
	Begin tracer study at Thomas Dairy	Continue tracer study at Thomas Dairy	Complete tracer study at Thomas Dairy
GENETIC MONITORING PROGRAM			
Develop a panel of ddPCR biomarkers for water quality monitoring	Develop bacterial biomarker monitoring methods (human, waterfowl, ruminant, dog, novel SPC)	Continue development for bacterial biomarker monitoring methods (human, waterfowl, ruminant, dog, novel SPC)	
	Pilot MST studies (ambient & MS4 sites)	Continue pilot MST studies (ambient & MS4 sites)	
	Collect time series data comparing coliphage molecular method to EPA method	Determine whether molecular coliphage methods are equivalent to EPA method	Apply genetic biomonitoring for BPR performance (time series data analysis)
Implement biomonitoring for improved treatment process control	Identify relevant BPR biomarkers & develop RT-ddPCR methods	Continue developing relevant BPR biomarkers & RT-ddPCR methods	Apply genetic biomonitoring for BPR performance (time series data analysis)
			Investigate role of phage in BPR stability
		Identify beneficial NTS cyanophage	Complete preliminary analysis beneficial NTS cyanophage
Understand impacts of microplastics to the WRRFs	Develop microplastics digestion & sampling methods	Quantify partitioning & impacts of microplastics through treatment train at one facility	Quantify microplastics impacts at multiple locations
		Continue monitoring MP through WRRFs	Investigate MP fate through tertiary treatment process

Objective	Initiatives		
	FY 24	FY 25	FY 26
Develop an eDNA-based metric of watershed health	Analyze pilot metabarcoding data	Continue analyzing pilot metabarcoding data Conduct paired eDNA/macro survey study	Begin developing watershed health metric based on pilot data with stakeholder input Analyze data from paired eDNA/macro survey study
Develop regional partnerships for monitoring key species' habitat & range using eDNA	Collect baseline RC outfall study samples Evaluate Pacific Lamprey and Western Ridge Mussel distribution in the TR watershed (TREE grant with TRWC) Develop ddPCR methods for Coho monitoring Analyze baseline RC samples for salmonid study	Conduct salmonid thermal passage eDNA study at RC outfall Develop ddPCR methods for Cutthroat trout & Steelhead monitoring; ground truth with spawning survey samples Complete analysis baseline RC samples for salmonid study	Partner with TSCWD & TRWC on invasive & key native species monitoring using eDNA Complete ground truth of ddPCR methods with spawning survey samples
Establish biological impacts of reuse water on wetland ecosystems	Conduct metagenomic analysis for subset of Thomas Dairy samples	eDNA analysis of Thomas Dairy soil samples	Integrate Thomas Dairy genetic data with other metadata & synthesize results & expand eDNA monitoring to additional sites as needed
DEVELOP AN ORGANIZATION RESEARCH STRATEGY			
Build a cohesive and inclusive R&I program	Continue CWS values research & understand impact & value of work Communicate value across CWS Measure research outcome	Continue sustain & improve R&I program across CWS	
Annual development of research agenda	Refine proposal program with dedicated funding		
	Annual research proposal program		
	Annual needs & expectations with stakeholders		

Objective	Initiatives		
	FY 24	FY 25	FY 26
PARTNERSHIPS AND INDUSTRY LEADERSHIP			
Lead innovation through industry & partnership	Attend & represent CWS at conferences & trainings		
	Participate in collaborations with peer utility, WRF, universities & other agencies		
INTERNAL AND EXTERNAL EDUCATION			
Train CWS staff	Provide educational opportunities to develop early career professionals in operations & applied engineering practices		
	Improve CWS networks by fostering long-term relationships with emerging industry leaders		
COLLECTIONS & CONVEYANCE			
Realtime modeling		Lead CWS mission toward having a real-time, predictive conveyance model to support operational decision making	
I/I Abatement project support		Support I/I abatement projects & CWS planning efforts by providing insightful I/I analysis	
Temporary & industrial discharge request support	Evaluate & respond to temporary & industrial discharge requests		
CIP modeling support	Provide modeling support for CIP projects		
Process improvement	Develop design standards for capacity analysis, planning & infrastructure sizing		
		Develop design & evaluation standards for analysis performed by outside consultants	
Climate change integration into analysis		Bring climate change analysis into evaluations	
		Update CWS climate change projections using the latest available data from IPCC	
Support conveyance sensory data analysis	Oversee & improve QC processes for CWS collected flow & rainfall data		
R&I LABORATORY MANAGEMENT			
Maintain laboratories to support R&I work in multiple locations	Maintain laboratory operation including safety, MSDS, training, equipment maintenance & ordering supplies		
	Hire, onboard & train temporary employees		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Provide design and start up guidance for capital improvement projects	Performance measure	Provide process engineering reviews on projects	Within 14 days of deliverable by consultant	Within 14 days of deliverable by consultant	Within 14 days of deliverable by consultant	Within 14 days of deliverable by consultant
Operational testing to support BPR stability	Performance measure	Perform BPR bioassays	Completed Monthly Residual Phosphorus Uptake testing	Completed Monthly Residual Phosphorus Uptake testing	Completed Monthly Residual Phosphorus Uptake testing	Completed Monthly Residual Phosphorus Uptake testing
Increase understanding and monitoring of digester stability	Performance measure	Perform weekly digester stability tests	85% of the weeks	85% of the weeks	85% of the weeks	85% of the weeks
Develop co-digestion product evaluation	Performance measure	Response time (feedback time)	4 weeks	Provide results and feedback to Ops/ES/CUOO within 4 weeks	Provide results and feedback to Ops/ES/CUOO within 4 weeks	Provide results and feedback to Ops/ES/CUOO within 4 weeks
Advanced monitoring program	Performance measure	Milestones in Asana met on time	4	4	3	3
Inform Emerging Contaminants Strategy	Performance measure	Milestones in Asana met on time	4	6	5	5
Support CWS priorities	Performance measure	Milestones in Asana met on time	4	3	4	4
Develop a panel of ddPCR biomarkers for water quality monitoring	Performance measure	# of project milestones completed	2	2	2	2
Implement biomonitoring for improved treatment process control	Performance measure	# of project milestones completed	1	1	1	1
Understand impacts of MPs to the WRRFs	Performance measure	# of project milestones completed	1	1	1	1

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Develop an eDNA-based metric of watershed health	Performance measure	# of project milestones completed	1	1	1	1
Develop regional partnerships for monitoring key species' habitat and range using eDNA	Performance measure	# of project milestones completed	2	2	2	2
Establish biological impacts of reuse water on wetland ecosystems	Performance measure	# of project milestones completed	1	1	1	1
Lead innovation through industry and partnership	Performance measure	# of conference presentations given	4	4	4	4
Train CWS staff	Performance measure	# of Trainings provided to CWS staff	2	2	2	2
Provide capacity analysis support for temporary/ industrial discharge requests	Performance measure	# of analysis performed for ES	15		15	15

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Reuse

Reuse provides resource recovery of outputs from the water resource recovery facilities. Solids removed from the water resource recovery facilities are stabilized and converted to Class B biosolids, which are land applied as a beneficial agricultural soil amendment. During the summer, approximately 83 million gallons of effluent are utilized for urban Class A reuse water irrigation. The Fernhill Natural Treatment System cools the effluent from the Forest Grove Water Resource Recovery Facility before discharge to the Tualatin River, while enhancing valuable wetland habitat in the process. The group is developing a composting program to divert organic waste from landfill disposal, produce a beneficial soil amendment, and reduce greenhouse gas emissions. The group is also further developing thermal management strategies for NPDES permit compliance, such as aquifer storage and recovery.

Goal

- Provide timely, efficient, and effective wastewater treatment services that meet the needs of stakeholders
- Develop nature-based solutions for permit compliance strategies
- Produce beneficial products from our wastewater process that enhance our local environment and reduce ratepayer expenses
- Develop a market analysis for products, including reuse, biosolids, compost, and natural treatment systems

Advantage

- Collaborative work environment with experienced and passionate employees
- State-of-the-art facilities, in-house expertise, and consultant support
- Flexible permit compliance and innovative problem-solving
- Good relationships with development community for sustainable infrastructure operations
- Results-oriented, recognized for achievements and technology implementation
- Led by visionary leadership, dedicated to county service district mission

Value - Added

- Provide a safe working environment
- Meet regulatory requirements and long-term compliance
- Recovery resources
- Provide consistent and reliable services
- Meet an uncertain future with certainty

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

CCE: Communications & Community Engagement

DS: Digital Solutions

FO: Field Operations

GHG: greenhouse gas

GIS: geographic information system

GPS: global positioning system

MG: million gallons

ODSL: Oregon Department of State Lands

PFAS: per- and polyfluoroalkyl substances

PS: pump station

RAD: Regulatory Affairs department

RUSD: Regional Utility Services department

SOP: standard operating procedure

TPS: Treatment Plant Services

WBMP: West Basin Master Plan

WRRD: Water Resource Recovery Operations & Services department



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
WATER REUSE			
Urban Phase I	Startup & commissioning reuse water to The Reserve Golf Course	Provide 100% reuse water to Reserve Golf Course	Design PS at Rock Creek to expand program to the west, collaborate with WRRD
	Partner with RUSD & TPS to modify Washington County land use permit		
	Expand reuse to Meriwether & Rood Bridge Park	Expand reuse to Rood Bridge Park, develop partnership with City of Hillsboro. Stakeholder engagement	Deliver reuse to Rood Bridge Park
	Partner with RUSD to discuss reuse in Cornelius		Pilot project design for Cornelius
	Partner with RUSD to work with Hillsboro directors around Rood Bridge Park & portion of Jackson Bottom owned by the City of Hillsboro		
Agricultural Phase II	Partner with FO construction crew to build irrigation laterals off existing main to risers Davis Tool		Collaborate with FO construction crew to build irrigation laterals off existing main to risers Jackson Bottom
	Startup & commissioning reuse water to Davis Tool		Provide 100% reuse water to Davis Tool
	Startup & commissioning reuse water to Davis Tool	Startup & commissioning reuse water to Davis Tool	Provide 100% reuse water to Davis Tool
	Collaborate with TPS to understand planning around WBMP to inform reuse in West Basin	Startup & commissioning reuse water to Davis Tool	Startup & commissioning reuse water to Jackson Bottom
	Work with Pacific Habitat Services to receive temporary removal fill wetland - Joint 404 permit (Army Corps / ODSL) for Davis Tool & Jackson Bottom	Work with Pacific Habitat Services to receive temporary removal fill wetland - Joint 404 permit (Army Corps / ODSL) for Jackson Bottom	
	Work with RAD to determine if Class C water can be distributed from FG, need to modify recycle water plan (to Zurcher & Elsberry-Terehorst)		
Improve nitrogen loading application	Implement agronomy automation services		In-house site authorizations

Objective	Initiatives		
	FY 24	FY 25	FY 26
Improve product reliability	Pilot GPS tool & deploy field rotation planning cycle	Evaluate & improve field rotation planning	Add more Willamette Valley sites & maximize local program
Improve communication reliability	Reduce error in spreading (GIS tool to map spreading, similar to street sweeping) with new GPS tool	Work with new vendor to develop communication protocols	Prevent any shutdowns due to poor communication
Optimize application rate	Partner with Lab to develop methods SOP for measuring residual nitrogen in soils (50/year)	Continue PFAS study at biosolids application sites	Develop in-house soil sampling capabilities for more efficient soil analysis
Provide biosolids services	Develop gasification pilot	Develop alternative to land application	Visit facilities performing alternatives to land application

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Urban Phase	Performance measure	Total gallons used for irrigation (million)	100	81	90	100
	Performance measure	Reuse water applied (MG)	100	81	90	100
Improve product reliability	Performance measure	Acres of land fertilized	22,500	22,500	22,500	22,500
Optimize application rate	Performance measure	Biosolids applied (dry tons)	10,200	10,200	10,200	10,200

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Treatment Plant Services

Treatment Plant Services provides engineering services for capital delivery of water resource recovery facilities, occupied building projects, and asset management projects. The program is responsible for the planning, design, construction, and operational handoff for upgrades needed to address near and long-term wastewater treatment capacity, regulatory compliance, occupied buildings, and existing asset management. This team collaborates with Operations, Maintenance, Legal Services, Regulatory Affairs, Finance & Accounting, Procurement, Facilities Management, and Research & Innovation staff to implement capital improvement projects.

Goal

- Plan, design, and construct capital projects utilizing innovative, efficient, and effective engineering practices
- Deliver informed engineering solutions
- Sustainable capital investment budget

Advantage

- In-house engineers with project ownership and accountability
- A culture of collaboration and knowledge-sharing across departments and teams
- Executive sponsors are engaged and committed to the success of capital projects
- Clearly defined decision-making authority and responsibility for different stages of capital projects
- Combined experience and success in delivering capital projects for CWS
- Inclusive customer engagement with O&M to support design, construction, and commissioning of capital projects
- Responsive customer experience including listening to the voice of the customer and providing actionable solutions to requests

Scope

- Capital improvement of facilities, wastewater treatment, pump stations, and force mains

Value - Added

- Building assets and infrastructure to meet anticipated growth and regulatory compliance
- In-house evaluation and assessment of new and existing technology
- Engineering decision-making and solutions for sustainable capital project budgeting

CWS Values

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We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

CM: construction manager

DC2: Digester complex

PM: project manager

R&I: Research and Innovation

ripl: Research+Innovation+Partners+Labs

RNG: renewable natural gas

UFAT: unified fermentation and thickening

UOPS: Utility Operations & Services department

WRRD: Water Resource Recovery Operations & Services department



PE Strength & Opportunities



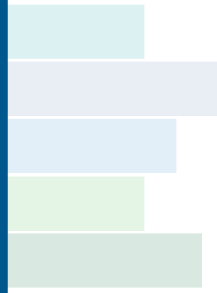
Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
Program development	Project delivery handoff from PM to CM		Update 2013 general conditions of the construction contract templates with Legal
	Prequalify construction contractors up to \$300k	Update 2013 general conditions of the construction contract templates	Electrical Master Plan for East Basin
	West Basin occupied facilities	Solids processing	
Capital expansion: treatment facilities administration	Project management: \$44M of projects		Project management: \$68M capital investment
Capital expansion: other facilities administration	Project management: \$12M	Project management: \$35M	Project management: \$34M capital investment
Capital program master plan: Durham	Predesign DC2		\$4M digester capital investment
	Expand & construct UFAT infrastructure		
		Predesign tertiary expansion	
Capital program master plan: Rock Creek	Partner with NW Natural on RNG design	Partner with NW Natural on RNG construction	\$6M RNG capital investment
	Construct primary clarifier 4		
	Predesign digester 3 & 4 rehabilitation		
	Partner with TD&R pilot test inDENSE technology to increase secondary treatment capacity		
Capital program master plan: Forest Grove	Design & construct primary clarifiers 1 & 2	Construct primary clarifiers 1 & 2	\$29M primary clarifier capital investment
	Construct reuse system improvements		
Capital program master plan: Hillsboro	Construction of high-head pump station improvements		\$3.9M high-head pump station capital investment
	Reuse System Support		
Capital program master plan: other facilities	Construct ripl		\$31M ripl capital investment
	Design Springer		

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Capital expansion: treatment facilities administration	Performance measure	Overall program \$ planned vs \$ spent	80%		80%	80%
Capital program master plan: Durham	Service level	Durham project phasing indicator	80%	80%	80%	80%
	Performance measure	Durham planned vs spent	80%		80%	80%
Capital program master plan: Rock Creek	Service level	Rock Creek planning project phasing indicator	80%	80%	80%	80%
	Performance measure	Rock Creek planned vs spent	80%		80%	80%
Capital program master plan: Forest Grove	Service level	Forest Grove planning project phasing indicator	80%	80%	80%	80%
	Performance measure	Forest Grove planned vs spent	80%		80%	80%
Capital program master plan: Hillsboro	Service level	Hillsboro planning project phasing indicator	80%	80%	80%	80%
	Performance measure	Hillsboro planned vs spent	80%		80%	80%



Natural Systems Enhancement & Stewardship Department



FY24-26

NSES

Natural Systems Enhancement & Stewardship

Full-time employees: 26

Departmental operating budget: 10,525,100

Natural Systems Enhancement & Stewardship is responsible for planning, designing, and implementing ecological enhancement and engineering, as well as maintenance and ongoing stewardship of a vast network of natural systems, including streams, wetlands, and forests in the Tualatin River watershed. Ecological enhancement, engineering, and stewardship are primary strategic actions for several major regulatory requirements, including National Pollutant Discharge Elimination System compliance with the temperature management plan, stormwater and surface water management plans, vegetated corridor standards, and other local, state, and federal requirements. The work of NSES, in compliance with CWS' authority under ORS 451, enables CWS to achieve watershed-scale ecological improvements by implementing collaborative strategies with conservation partners. The partners are integral to the delivery of NSES services, contributing funds that increase the scale and scope of enhancement, land access to more than 7,000 acres of high-value natural areas, and a broader capacity to engage diverse communities in the stewardship of the public's natural resources.

NSES staff work on hundreds of sites, varying in size from under an acre to more than a thousand acres, and distributed throughout Washington County. Work activities include managing native vegetation enhancement with dozens of service contractors, conducting ecological engineering design, obtaining and complying with environmental permits, and overseeing the construction of enhancement projects. Stewardship activities increase the value of CWS investments in streams, wetlands, riparian forests, and other natural areas over time by monitoring and managing emerging threats to long-term forest health, including invasive species, wildfire, urbanization, and climate change.

Key Strategic Outcomes (KSO):



Abbreviations

DART: days away, restricted, or transferred (used to measure workplace safety)

FO: Field Operations

FTE: full-time equivalent or full-time employee

GIS: geographic information system

kcal: kilocalorie

UAS: uncrewed aircraft systems

WRRD: Water Resource Recovery Operations & Systems department











PE Strength & Opportunities





Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Total active project acres	n/a	6,928	7,173	
New active project acres	245	1,261	245	245
Acres of farmland enrolled in co-sponsored incentive programs	n/a	1,559	1,609	1,659
New acres of farmland enrolled in co-sponsored incentive programs	50	33	50	50
Number of new projects enrolled in co-sponsored incentive programs	6	9	6	6
Number of new access agreements executed for enhancement projects	20	18	20	20
Projects monitored & measured annually per monitoring protocol (total includes shade, vegetated & combined)	150	152	150	150
Number of UAS missions	60	64	60	60
Total thermal load reduction to Tualatin River & tributaries through riparian enhancement (kcal/day)	n/a	1,236 million	1,296 million	1,356 million
Number of contracts executed per year	230	209	230	230
Total number of native plants installed	780,000	795,474	780,000	780,000

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Cumulative stream miles enhanced starting in 2004	n/a	179	184	189
New stream miles enhanced annually	5	6	5	5
Approximate value of land contributed through transformational partnerships	n/a	\$90,910,000	\$94,124,000	\$97,339,000
Other funding leveraged through transformational partnerships	\$500,000	\$752,534	\$500,000	\$500,000
Department DART score	< 1.0	0	0	0
Cost per kcal of thermal credit through streamside reforestation, enrolled	< \$0.15	\$0.08	\$0.08	\$0.08
Cost per acre of land managed in Stewardship	< \$866	n/a	\$571	\$588
Percentage of staff that have documented & approved development plans	100%	100%	100%	100%

Objective	Objective Statement	KSO
Ensure employee safety	Implement & manage programs to ensure the health, safety & well-being of department staff.	
Cultivate employee engagement	<p>Promote participation in annual Gallup employee engagement surveys, host Gallup conversations, develop & implement Action Plans annually to improve department culture & employee engagement.</p> <p>Support structured learning at individual, team & organizational levels, expanding skill sets, fostering career growth, ensuring smooth transitions, retaining talented staff & improving communication across all levels to achieve a resilient organization delivering high-value services to ratepayers & the community.</p>	
Plan enhancement strategies	Build a guiding strategy, acquire access, foster collaborative subbasin planning, implement resilient stormwater management & prioritize multiobjective enhancement opportunities through careful research & evaluation.	
Advance ecological outcomes	Generate a proactive approach with regulatory compliance & climate adaptation, rigorous outcome evaluation using GIS & field data & the development of nature-based solutions.	
Advance enhancement methods	Implement a proactive strategy with regulatory compliance & climate adaptation, rigorously evaluate & disseminate outcomes using GIS & field data & develop nature-based solutions. Explore opportunities for CWS to provide additional services to co-implementers, developers & partners by leveraging expertise in natural systems, including subbasin planning to address multiple stormwater objectives, resilient stream corridors, water quality & quantity retrofit, fee-in-lieu, regional stormwater management approaches, payment-to-provide, etc.	
Deliver enhancement	Develop & implement projects that enhance natural system functions & values.	
Steward natural systems	Sustain natural & built system functions & build value of natural capital that meets regulatory needs & goals of CWS, benefiting the health of the river & protecting clean water.	
Catalyze collective capacity	In support of CWS external partner management & education strategies, build & strengthen partnerships for creating a network of organizations to co-steward & support natural system functions & values.	

Objective	Objective Statement	KSO
Optimize delivery processes	Create & improve consistent delivery processes that clarify & document purpose, workflow & results while simplifying information systems & reducing complexity.	
Strengthen operations collaboration	Continue collaborating with WWRD, FO & Reuse & make connections between work done in each group as detailed in Program Roadmaps. Foster regular communication & strategic alignment between Utility Operations work groups.	

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Landscape Strategies

Landscape Strategies works to ensure a healthy and resilient watershed through integrated conservation approaches. LS brings together essential resources and forges strong partnerships that support economic and environmental vitality of the region. Key elements of this work include planning ecological enhancement; stormwater and nature-based solutions; integrating natural system approaches with surface water regulations; building partnerships that increase the scale and impact of CWS investments; developing tailored subbasin enhancement strategies addressing unique challenges and maximizing benefits to communities; providing multiscale ecological integrity assessment of program effectiveness for regulatory reporting purposes; and leveraging innovative technology, including uncrewed aerial systems, remote sensing, and geographic information systems to improve decision-making, evaluate results, and enhance effectiveness.

Goal

- Provide timely, efficient, and effective services that meet the needs of CWS
- Increase the scope, scale, efficiency, and effectiveness of natural system enhancement and stewardship

Advantage

- Commitment to quality work
- Adept interdisciplinary expertise and knowledge
- Creative incubator of innovative ideas and techniques
- Mission-motivated people with flexible learning mindset
- Trust-based relationships with partners and community groups

Scope

- Planning regional-scale strategies for ecological enhancement, and surface water and stormwater management that restore and sustain watershed health by integrating science-based approaches with community needs, and creating opportunities for co-investment with partners

Value - Added

- Plan efficient projects and programs to achieve watershed priorities
- Develop science-based mechanisms to integrate natural systems with stormwater requirements
- Provide expertise and support to subbasin planning
- Build knowledge systems for data-driven decision support and program performance
- Provide geospatial science, and business system services to NSES and CWS
- Monitor and evaluate effectiveness and efficiency of enhancement and stewardship for regulatory compliance
- Foster regional data partnerships

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

API: application programming interface
CCE: Communications & Community Engagement
CIP: Capital Improvement Program
DART: days away, restricted, or transferred (used to measure workplace safety)
DS: Digital Solutions
EDI: equity, diversity, and inclusion
EIA: ecological integrity assessment
FO: Field Operations
GHG: greenhouse gas
GIS: geographic information system
GS: Goal Share, Goal Sharing
IGA: intergovernmental agreement
kcal: kilocalorie
LSC: local safety committee
LiDAR: Light Detection and Ranging
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
NSES: Natural Systems Enhancement & Stewardship department
PDP: professional development plan
RAD: Regulatory Affairs department
RC: Rock Creek
RES: Reuse & Ecosystem Services
RSC: resilient stream corridor
SWMP: Surface Water Management Plan
THPRD: Tualatin Hills Park & Recreation District
TSWCD: Tualatin Soil and Water Conservation District
TT: TerraTrak
UAS: uncrewed aircraft systems
WBMP: West Basin Master Plan
WET: Water & Engineering Technology department
WRRF: water resource recovery facility
WRRD: Water Resource Recovery Operations & Services department




PE Strength & Opportunities




Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ENSURE EMPLOYEE SAFETY			
Promote safety culture		Support work of & participate in the LCS; share & regularly evaluate safety resources, best practices, & CWS policies; report DART annually	
Implement safety training		Develop safety training matrix for individual positions	Ensure staff complete necessary safety training, incorporate in PDP
CULTIVATE EMPLOYEE ENGAGEMENT			
Develop & implement learning objectives for NSES staff	Establish & monitor PDPs for each team member & continue to support successful onboarding		
	Conduct self-evaluations, midyear check-ins & performance reviews with each team member		
Support learning for team effectiveness, collaboration & communication skills	Implement pilot for two new tools supporting team communication	Evaluate pilot & adjust tools for next phase	Develop process & tools to support efficient delivery of team learning workshops
	Support peer learning about EDI 		
Support organizational-level learning about NSES & the systems we are responsible for	Deliver passport presentations & tours for key stakeholders		Deliver passport presentations & tours for key stakeholders; develop & deliver NSES outreach & engagement materials
	Host open house for vegetation management & enhancement contractors	Support procurement study of contractor opportunities	Implement contractor engagement action plan
		Support CWS Learning program with onboarding about NSES	
Develop & implement Gallup action plan	Implement pilot of two new departmental communication tools	Focus action plan on Question 1 – “I know what is expected of me at work”	Host Gallup conversation to determine action plan focus

Objective	Initiatives		
	FY 24	FY 25	FY 26
PLAN ENHANCEMENT STRATEGIES			
Identify, plan & enroll project portfolios for thermal credit, stormwater & other regulatory needs	Develop enhancement strategy framework & apply to priority study areas		Apply strategy framework to another pilot strategy area
			Develop project approaches by advancing the enhancement strategy
	Develop strategies around acquiring data to support planning		
			Develop web map tool for sharing data to facilitate enhancement & stormwater strategies
Evaluate & prioritize enhancement opportunities	Develop project prioritization criteria, evaluation tool & procedure	Refine criteria, tool & process; apply to new projects	Collaborate with internal & external partners to refine & integrate criteria; adapt tools to support data-driven decision-making
	Pilot use of the CCE project brief to support project prioritization considering culturally important activities	Organize peer learning with community partners about prioritization considering culturally important activities	Develop pilot project with partners including culturally important activities with delivery of CWS & partners' services
Develop & implement access strategies	Work with partners to facilitate access to partner-owned natural areas for enhancement & stewardship		
	Develop new templates for documenting THPRD IGAs	Update TSWCD IGA for urban areas	Identify areas of mutual interest to expand conservation land base with land management agencies
	Review & document NSES access agreement approaches, requirements, limitations & focus areas for acquisition		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Support integrated subbasin & project planning	Support stormwater coordination team with MS4 program planning & coordination		Support stormwater coordination team with MS4 activities to implement the SWMP, including surface water CIP, SWMP 2.0, the hydromodification assessment report & retrofit plan
		Provide natural systems focus area expertise to planning of integrated projects, including WBPM, Metzger Trunk - Ash Creek, Fanno integrated solutions & Rosedale planning area	Provide natural systems focus area expertise to planning of integrated projects, including WBMP, Metzger Trunk - Ash Creek, Fanno integrated solutions, Rosedale & West Sherwood planning areas, reuse water master plan, pump stations, etc.
		In coordination with Capital Planning, evaluate needs & opportunities to create required mitigation credits for capital infrastructure projects, including vegetated corridors, wetlands, streams & other resources	
		Support regional planning & co-implementers with identifying & evaluating priority stormwater retrofit & fee-in-lieu opportunities	
Develop resilient streams stormwater strategies	Evaluate methods to assess the value of RSC approaches to manage stormwater by testing available options on pilot areas	Evaluate methods to assess the value of RSC approaches to manage stormwater by testing available options on pilot areas	
	Support stormwater strategy development for South Bull Mountain – Kingston Terrace	Advance feasible RSC stormwater management approaches for South Bull Mountain	Develop South Bull Mountain implementation plan to advance feasible approaches for stormwater management
	Provide input to Cooper Mountain Utility Plan in support of City of Beaverton's planning goals	Support City of Beaverton utility plan for Cooper Mountain by evaluating opportunities for RSC pilot approaches	Develop McKernan Creek implementation plan in support of feasible regional stormwater management approaches, such as RSC
			Support regional planning & stormwater strategy development for West Sherwood urban expansion area

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADVANCE ECOLOGICAL OUTCOMES			
Evaluate & disseminate ecological outcomes	In coordination with RAD, collect, analyze & report data required for NPDES & MS4 annual reports, including the temperature management plan		
	Develop prototype of data-driven case studies that communicate ecosystem benefits & community values	Assess overall status of benefits provided to establish targets & measures; work with Tree for All to establish shared measures for tree canopy & habitat connectivity; evaluate ecosystem benefits intersection with community needs	Update & improve data-driven case study dashboard to incorporate Tree for All shared measures for tree canopy & habitat connectivity
	Conduct EIA & integrate data across 3 scales: watershed, project & plot level	Conduct EIA & integrate data across 3 scales: watershed, project & plot level; develop prototypes of monitoring data dashboard to integrate multiple data types	Conduct EIA & integrate data across 3 scales: watershed, project & plot level; develop monitoring data dashboard to support metrics for project & program management effectiveness
	Develop remote sensing tools to assess indicators & stressors of ecological integrity at watershed scale	Develop remote sensing tools to assess indicators & stressors of ecological integrity at watershed scale; develop prototypes of Tree for All shared measures	Develop remote sensing tools to create ecological datasets (e.g., land cover, ash canopy) & assess indicators & stressors at watershed scale; support evaluation of Tree for All shared measures
	Further refine & apply tools for rapid, qualitative monitoring assessments to evaluate ecological conditions for combined projects	Further refine & apply tools for rapid, qualitative monitoring assessments to evaluate ecological conditions for combined projects; collect data at pilot projects & create prototype dashboard 	Implement qualitative monitoring to evaluate ecological management unit effectiveness with Stewardship group
	Conduct intensive quantitative monitoring of enhancement projects to support required regulatory reporting & adaptive management		

Objective	Initiatives		
	FY 24	FY 25	FY 26
Deliver geospatial science & data analysis services	Support GIS, UAS & knowledge system needs to manage natural system elements across CWS		
	In coordination with RAD, collect, analyze & report data required for NPDES & MS4 annual reports		
	Determine data required to support NSES planning & prioritization needs		
	Identify data gaps; develop GIS datasets & metadata to support data-driven decision-making for natural system investments		
	Develop & refine spatial analyses to inform subbasin planning & enhancement strategies		
	Collaborate with partners to create & update regional ecological datasets		
	Work with DS to acquire necessary software, licenses & other related resources		
	Develop digital cartographic maps, web maps, story maps, visualizations & applications to communicate information to internal & external stakeholders		
Identify & develop nature-based solutions to meet current or future regulatory requirements	Support long-term regulatory compliance & stormwater strategic roadmaps with natural system expertise		
		Provide natural systems focus area expertise to reuse water master plan	Refine reuse water implementation plan; collaborate with internal & external partners & reuse water operations to develop strategic plans for expanding reuse water opportunities
	Explore opportunities to establish ecosystem credits or offsets in the regulatory framework & other business needs		
ADVANCE ENHANCEMENT METHODS			
Evaluate & adapt practices	Continue implementing, evaluating & adapting technical improvements & innovations that promote nature-based solutions to meet permit requirements, support watershed health & climate resiliency		
Catalyze collaboration for transformative research	Develop digital twin concept in collaboration with DS & Operations partners	Develop digital twin concept & foundational data management systems in collaboration with DS & Operations partners, including WRRD, FO, RES & WET	
	Begin implementing study design & continue developing partner support		
	Convene regular EcoTeam meetings & sponsor peer learning among ecological experts		
	Assess & evaluate actions to mitigate wildfire risks with partners		

Objective	Initiatives		
	FY 24	FY 25	FY 26
OPTIMIZE DELIVERY PROCESSES			
Improve NSES budget process	Centralize budget management with NSES Operations team		
	Streamline tools for NSES budget process & provide on shared, accessible platform	Refine NSES budget process; communicate key NSES information & improve sorting of projects that align with Capital Planning & CWS Operations teams, including FO, RES & WRRD	
	Train new NSES employees & provide ongoing updates to staff for budget guidelines, processes & tools		
Refine project development process	Develop processes & tools for project initiation & development planning. Provide guidance for project leads	Develop processes & tools for project initiation & development planning; provide guidance, training & support for project leads in Project Delivery, Stewardship & RES	Refine processes & tools for project initiation & development planning; provide guidance, training & support for project leads in Project Delivery, Stewardship & RES; create scope for data management requirements of long-term asset management
Enhance natural system asset management business systems	Improve TT user interface & user experience; improve workflows; assess data needs & requirements	Improve TT user interface & user experience; improve workflows; refine data needs & requirements; update schema to support project planning & reporting needs; update API to support programmatic dashboards/visualizations	
		Develop programmatic reports & visualizations that support shared metrics for performance excellence & continuous improvement	
	Establish & refine NSES project data standards; update & maintain metadata & documentation about key business data in NSES		
STRENGTHEN OPERATIONS COLLABORATIONS			
Coordinate project & program development with internal work groups		Participate in & provide subject matter expertise to reuse water master plan	Evaluate portfolio of existing & planned projects to identify & evaluate opportunities for reuse water
	Explore innovative & effective UAS applications throughout CWS & the Operations team	Explore innovative & effective UAS applications throughout CWS & the Operations team; support RES, FO & WRRD with UAS imaging & remote sensing needs, including multispectral time-series assessment & mapping of reuse applications, the thermal signature of the WRRF effluent downstream of RC & potential GHG emissions	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Cultivate employee engagement	Performance measure	Percentage of staff that have documented & approved development plans	100%	40%	100%	100%
Plan enhancement strategies	Service level	Total thermal credit from riparian enhancement (kcal/day)	n/a	618 million	648 million	678 million
	Performance measure	New thermal credit from riparian enhancement - enrolled per year (kcal/day)	30 million kcal/day	8.8 million	30 million	30 million
Advance ecological outcomes	Service level	Number of UAS missions per year collecting valuable remote sensing data	60	64	60	60
	Service level	Projects monitored & measured annually per monitoring protocol (total includes shade, vegetated & combined)	150	Total: 152 Shade: 22 Veg: 103 Shade & Veg: 27	150	150
	Performance measure	Other funding contributed through transformational partnerships	\$500,000	\$752,534	\$500,000	\$500,000
Optimize delivery process	Service level	Number of contracts executed per year	230	210	230	230

Program Roadmap

Organizational Excellence

Integrated Water Resource Management & Resilient Watersheds



FY24-26



Project Delivery

Project Delivery supports multidisciplinary partnerships to design and implement urban and rural projects that support a healthy and resilient watershed. Key elements of this work include developing, designing, and constructing multi-objective projects in support of sanitary and storm system infrastructure, ecological enhancement of streams, wetlands and floodplains, integrated water resources management, and integration of partner needs, including transportation, trails, and other infrastructure.

Goal

- Provide timely, efficient, and effective project delivery services that meet the needs of CWS

Advantage

- Staff experience, training, and enthusiasm for the work
- Relationships with transformational partners in natural system conservation and enhancement
- Collaborative approach to integrated CWS projects
- Connections to internal research program, professional community, and trade organizations

Scope

- Implementation of enhancement, stormwater, and infrastructure protection projects in natural areas

Value - Added

- Create high-functioning natural areas for improved water quality
- Implement approaches to meeting NPDES permit conditions, including the MS4, that result in greater outcomes than traditional utility approaches
- Provide expertise in natural science and engineering for integrated CWS projects

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

BOR: Bureau of Reclamation
CE: Conveyance Engineering
CP2: Capital Project Permitting
D&C Standards: Design and Construction Standards
DART: days away, restricted, or transferred
EDI: equity, diversity, and inclusion
FLOWS: floodplains, wetlands, and streams
FO: Field Operations
IPCT: Integrated Project Coordination Team
kcal: kilocalorie
LSC: local safety committee
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
NSES: Natural Systems Enhancement & Stewardship department
ODSL: Oregon Department of State Lands
PDP: professional development plan
PE: Performance Excellence
PS: pump station
RSC: resilient stream corridor
SOD: Safety of Dams
THPRD: Tualatin Hills Park & Recreation District
TSWCD: Tualatin Soil and Water Conservation District
USACE: U.S. Army Corps of Engineers
USFWS: U.S. Fish and Wildlife Service
VCEF: Vegetated Corridor Enhancement Fee



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ENSURE EMPLOYEE SAFETY			
Cultivate culture of safety		Support the work of & participate in the LSC; share & regularly evaluate safety resources, best practices & CWS policies; report DART annually	
Implement employee safety training		Develop safety training matrix for individual positions	Ensure staff complete necessary safety training, incorporate in PDPs
CULTIVATE EMPLOYEE ENGAGEMENT			
Develop & implement learning objectives for NSES staff	Establish & monitor PDPs for each team member & continue to support successful onboarding		
	Conduct self-evaluations, midyear check-ins & performance reviews with each team member		
Support learning for team effectiveness, collaboration & communication skills	Implement pilot for two new tools supporting team communication	Evaluate pilot & adjust tools for next phase	Develop process & tools to support efficient delivery of team learning workshops
	Support peer learning about EDI		
Support organizational-level learning about NSES & the systems we are responsible for	Deliver passport presentations & tours for key stakeholders		Deliver passport presentations & tours for key stakeholders; develop & deliver NSES outreach & engagement materials
	Host open house for vegetation management & enhancement contractors	Support procurement study of contractor opportunities	Implement contractor engagement action plan
Develop & implement Gallup action plan	Implement “How to work with me” exercise between supervisors & staff	Focus action plan on Question 1 – “I know what is expected of me at work”	Host Gallup conversation to determine action plan focus
ADVANCE ENHANCEMENT METHODS			
Acquire & maintain water resources	Manage CWS coordination with BOR on the SOD project, advocating for the interests of CWS regarding stored water		
	Maintain stored water resources at Hagg Lake & Barney Reservoir by administering agreements		
	Support CWS programs (including Reuse) as needed to acquire & maintain water rights for enhancement of the Tualatin River & tributaries		

Objective	Initiatives		
	FY 24	FY 25	FY 26
DELIVER ENHANCEMENT			
Identify & develop enhancement projects	Scope enhancement projects for Butternut Creek Reach 2, Bethany Pond, Fanno Creek Elderberry Ridge, Rock Creek South	Develop prioritized projects from enhancement strategies	
Deliver revegetation enhancement projects	Continue to collaborate with partners (TSWCD, Metro, USFWS, THPRD, cities, etc.) on revegetation projects		
	Continue to assess & enhance development sites to meet regulatory requirements through the VCEF program		
Deliver constructed enhancement projects		Design & permit enhancement projects: Butternut Creek Reach 2, Bethany Pond, Fanno Creek Elderberry Ridge,	
	Complete construction projects: Balm Grove Dam removal, West Bethany Creek enhancement		Construct Bethany Pond Sanitary Protection Project
	Monitor & adaptively manage constructed projects to ensure desired outcomes		
Support integrated projects	Collaborate with CE on planning, design & construction/ revegetation of Cedar Mill Creek, Metzger - Ash Creek, Fanno Integrated Solutions	Collaborate with CE on planning, design & construction/ revegetation of Metzger - Ash Creek, Fanno Integrated Solutions, Brookman Sanitary Sewer Extension	
	Collaborate with PS engineers on planning, design, construction/ revegetation of Rosedale PS, Chicken Creek PS	Collaborate with PS engineers on planning, design, construction/ revegetation of Rosedale PS, Chicken Creek PS, Cooper Mountain PS, Aloha PS	
	Participate in IPCT to support implementation of integrated project tools to meet ongoing & evolving team needs		
Implement RSC stormwater strategies	Identify, develop & deliver RSC projects: South Cooper Mountain, Kingston Terrace Expansion, Lower Butternut Creek	Identify, develop & deliver RSC projects: South Cooper Mountain, Kingston Terrace Expansion, West Sherwood	

Objective	Initiatives		
	FY 24	FY 25	FY 26
Develop & maintain ecological engineering guidance & documentation	Finalize & adopt FLOWS Erosion & Sediment Control Manual		Incorporate FLOWS Erosion & Sediment Control Manual into annual CWS training for co-implementers & CWS staff
	Collect & manage standard enhancement details; provide input on D&C Standards revisions		
OPTIMIZE DELIVERY PROCESSES			
Develop adaptive management & monitoring process	Identify staff roles, monitoring schedules, adaptive management plan templates, data collection & organization		Refine adaptive management plan templates & data collection/organization tools & processes
Improve project delivery process & organization systems	Implement standardized organization system for NSES project file storage		
	Develop & maintain tracking tool for NSES-constructed projects		Maintain tracking tool for NSES-constructed projects
	Document specific enhancement implementation needs for enhancement partners for consistent implementation		
	Develop business case & deliverables templates for consistent project documentation		
Streamline permitting	Work with CP2 program to identify & implement strategies to streamline permitting with regulators including Washington County, ODSL, USFWS, USACE		Work with CP2 to propose code changes for grading permit exemptions & Type 1 land use authorizations for work in stream corridors
STRENGTHEN OPERATIONS COLLABORATION			
Collaborate with Reuse Program	Collaborate with Reuse Program on planning, design & construction/ revegetation of Jackson Bottom & Davis Tool wetland irrigation projects		
Address exposed mains & laterals	Finalize risk assessment criteria, monitoring schedule	Refine roles & program communication	
	Coordinate with FO to temporarily stabilize Fanno Woodard Park exposed sanitary line; design repairs at other sites	Coordinate with FO to conduct monitoring & risk assessment; develop projects	Coordinate with FO to stabilize exposed lines at Fairway Drive site; stabilize exposed lines at Springville Creek at Alfalfa Drive

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Cultivate employee engagement	Performance measure	Percentage of staff that have documented & (approved by supervisor) development plans	100%	100%	100%	100%
Advance enhancement methods	Service level	Volume of water enhancing Tualatin River flow through water resource agreements (acre-feet)	1,305	1,305	1,305	1,305
Deliver enhancement	Service level	Native plants installed	780,000	795,474	780,000	780,000
	Service level	Number of new access agreements executed for enhancement projects	20	18	20	20
	Performance measure	Average cost per kilocalorie (kcal) thermal credit (enrolled)	\$<0.15	\$0.08	\$0.08	\$0.08

Program Roadmap

Organizational Excellence

Catalyzing Transformational Partnerships



FY24-26



Stewardship Services

The Stewardship team cost-effectively manages plant materials for CWS vegetation projects and maintains established enhancement areas to ensure regulatory compliance with the temperature management plan. Working with regional conservation partners adds value by supporting CWS community partnerships that engage the public and by developing programs to respond to emerging needs of the community within natural systems (e.g., emerald ash borer; climate adaptation; equity, diversity, and inclusion; illegal camping and houselessness; beaver co-existence; wildfire management). Investments in community-based programs return many times the value in matching funds and in-kind services and support continued land access.

Goal

- Provide timely, efficient, and effective project delivery services that meet the needs of CWS

Advantage

- Adept expertise and knowledge
- Incubator of innovative ideas
- Mission-motivated people
- Trust-based relationships with partners and community groups

Scope

- In coordination with and supporting CWS goals, the Stewardship team works on the ground in communities across the Tualatin River watershed to ensure enhancement investments are maintained and functioning. Transformational partnerships are the foundation of providing cost-effective and long-term stewardship, building healthy communities, and protecting the river.

Value - Added

- Ensures regulatory compliance by maintaining function of enhancement projects and transformational partnerships
- Supports public health and river health using nature-based solutions that provide multiple benefits to the community

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

CAPM: climate adaptive plant material

CCE: Communications & Community Engagement

DART: days away, restricted, or transferred

EDI: equity, diversity, and inclusion

EDRR: early detection rapid response

EMU: enhancement management unit

FO: Field Operations

IPM: Integrated Pest Management

kcal: kilocalorie

LSC: local safety committee

NSES: Natural Systems Enhancement & Stewardship department

PE: Performance Excellence

PDP: professional development plan

TRF: Tualatin River Farm

TRNWR: Tualatin River National Wildlife Refuge

VCEF: Vegetated Corridor Enhancement Fee








PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ENSURE EMPLOYEE SAFETY			
Cultivate culture of safety		Support work on the LSC, share & regularly evaluate safety resources, best practices & CWS policies	
Implement employee safety training		Develop safety training matrix for individual positions	Ensure staff complete necessary safety training, incorporate in PDPs
CULTIVATE EMPLOYEE ENGAGEMENT			
Develop & implement learning objectives for NSES staff	Establish & monitor PDPs for each team member & continue to support successful onboarding		
	Conduct self-evaluations, midyear check-ins & performance reviews with each team member		
Support learning for team effectiveness, collaboration & communication skills	Implement pilot for two new tools supporting team communication	Evaluate pilot & adjust tools for next phase	Develop process & tools to support efficient delivery of team learning workshops
	Support peer learning about EDI 		
Support organizational-level learning about NSES & the systems we are responsible for	Deliver passport presentations & tours for key stakeholders		Deliver passport presentations & tours for key stakeholders; develop & deliver NSES outreach & engagement materials
	Host open house for vegetation management & enhancement contractors	Support procurement study of contractor opportunities	Implement contractor engagement action plan
Develop & implement Gallup action plan	Gallup – how to work with me exercise between supervisor & staff	Focus action plan on Question 1 – “I know what is expected of me at work”	Host Gallup conversation to determine action plan focus
ADVANCE ECOLOGICAL OUTCOMES			
Adapt plant materials for climate resiliency	Co-create & implement response plan for tree loss due to climate change: study, seed collection, grow out 		Implement response plan for tree loss due to climate change: study, seed collection, grow out 

Objective	Initiatives		
	FY 24	FY 25	FY 26
STEWARD NATURAL SYSTEMS			
Reduce, respond to & repair impacts of stressors to natural systems through adapted resilience of all CWS ecological enhancement projects in the Tualatin River basin	Collaborate with conservation partners on projects to study & develop plans for potential risks to our natural systems: emerald ash borer 	Collaborate with conservation partners on projects to study & develop plans for potential risks to our natural systems: climate change, wildfire risk 	
	Lead efforts to respond to emerging threats & stressors to CWS natural assets		
	Develop & implement best management practices to repair damages: increase species diversity, address EDRR weeds		Develop & implement best management practices to repair damages: increase species diversity, address EDRR weeds
Manage operations to build & ensure long-term, cost-effective support for ecological enhancement projects	Manage native plant storage, growing facilities, tools, TRF infrastructure for CWS plant material program projects & tools, monitor for pathogens		
	Design & install clean nursery	Plan & design refrigerated native plant warehouse	Design refrigerated native plant warehouse
	Propagate & grow native plant understory species to address needs	Harvest & maintain native plant communities	
			Explore prescribed &/or cultural burning as plant & seed propagation at TRF
	Manage IPM program for CWS		
Sustain natural & built system functions & build value of natural capital that meets regulatory needs, goals of CWS, benefits the health of the river & protects clean water	Manage & monitor EMU projects at Beaverton, Fanno, Lower Gales, Rock Creeks, TRNWR		
	Manage enhancement projects meeting or nearly meeting stewardship status: community projects, combined projects, VCEF projects		
	Conduct ongoing evaluation of enhancement methods, tools & practices to ensure ecological function		
	Conduct ongoing evaluation & exploration to provide most effective acreage management		


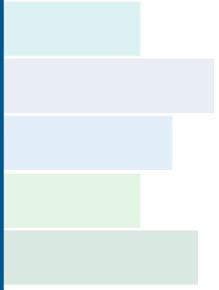
Objective	Initiatives		
	FY 24	FY 25	FY 26
CATALYZE COLLECTIVE CAPACITY			
Build & implement framework to guide work with land & water stewardship partners to protect natural system assets & meet regulatory & stormwater needs	Building upon Tree for All visioning & understanding of regional stewardship partners' mutual goals, identify & implement multipartner collaborative projects	Support CCE with CWS partnership strategy to meet NSES enhancement requirements	
		Partner with local native nurseries, indigenous community members & restoration contractors	
	Support implementation of projects, learning & connections through & CWS Indigenous Partners Group		
Build & implement framework to guide work with internal partners to protect natural system assets	Proactively coordinate with CCE to develop & implement internal procedures, processes & tools for collaborating	Develop work plan to implement & measure framework	Implement work plan for coordinating with internal programs & measure framework
	Coordinate with CCE to inform & integrate CWS partnership matrix		
	In coordination with CCE, co-lead public engagement native plant events, outreach & activities		
STRENGTHEN OPERATIONS COLLABORATION			
	Coordinate with FO to construct TRF site improvements for the CAPM program	Coordinate with FO to evaluate, plan & construct onsite septic service at TRF for staff restrooms	
		Provide plant material identification training to FO staff; coordinate with FO to evaluate opportunities to update approved plant material lists for stormwater facilities	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Steward natural systems	Service level	Total active project acres	n/a	6,928	7,173	7,418
	Service level	Acres of farmland enrolled in co-sponsored incentive programs	n/a	1,559	1,609	1,659
	Service level	Total thermal load reduction to Tualatin River & tributaries (kcal/day)	n/a	1,236 million	1,296 million	1,356 million
	Performance measure	Enhancement projects achieving greater than 40% canopy cover, measured at five-year intervals	95%	96%	96%	96%
	Performance measure	Cost per acre of land managed in Stewardship	<\$866	n/a	\$571	\$588
Catalyze collective capacity	Service level	Number of new projects enrolled in co-sponsored incentive programs	5	5	5	5
	Service level	Approximate value of land contributed through transformational partnerships	n/a	\$90,910,000	\$94,124,000	\$97,339,000
Cultivate Employee Engagement	Performance measure	Percentage of staff that have documented & approved PDPs	100%	100%	100%	100%



Utility Operations & Services Department



FY24-26

UOPS

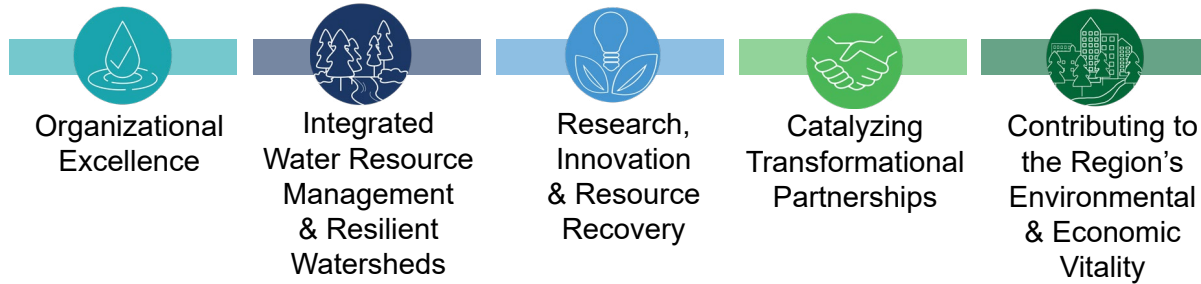
Utility Operations & Services

Full-time employees: 80

Departmental operating budget: \$15,277,800

Utility Operations & Services is responsible for the operations and maintenance of CWS' storm sewer and sanitary sewer conveyance systems and its Fleet program.

Key Strategic Outcomes (KSO):



Abbreviations

AM: asset management
 BPI: business process improvement
 CEL: Culture, Equity & Learning
 CIP: Capital Improvement Program
 CMOM: capacity, management, operation, and maintenance
 DART: days away, restricted, or transferred
 DS: Digital Solutions department
 EAC: Employee Advisory Council
 FO: Field Operations
 FTE: full-time equivalent or full-time employee
 GIS: geographic information system
 HR: Human Resources department
 IT: information technology
 JSA: job safety analysis
 MS4: Municipal Separate Storm Sewer System
 NPDES: National Pollutant Discharge Elimination System
 NSES: Natural Systems Enhancement & Stewardship department
 SOP: standard operating procedure
 UOPS: Utility Operations & Services department
 WRRD: Water Resource Recovery Operations & Services department


















PE Strength & Opportunities


















Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Routine sanitary line cleaning (feet)	930,000	917,000	920,000	930,000
Routine sanitary line TV inspection (feet)	515,000	509,000	510,000	515,000
Routine street sweeping (miles)	11,550	12,000	11,500	11,550

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
DART score	<1.0			
Number of sanitary sewer overflows per 100 miles of collection system (per calendar year)	<2.0	<2	<2	<2
Response to customer service request	100%	100%	100%	100%
Fleet availability rate				

Objectives	Initiative Statements	KSO
ADMINISTRATION		
Ensure crew safety	UOPS Administration program supports FO to construct, maintain, repair & rehabilitate the public storm & sanitary sewer collection systems	
	Maintain low level DART due to on-the-job injuries	
Strengthen operations collaboration	Continue collaborating & making connections between work done in the four Operations groups (WRRD, NSES, Reuse & FO)	
Improve talent retainment	Increase career progression opportunities & capacity to accomplish work	
	Work with HR & CEL – EAC to align employee input with workplace offerings (e.g., generational work styles)	
	Develop & finalize long-term operations staffing plan	
Improve workflow planning & management	Monitor FO internal work request system & make adjustments as needed	
	Build capacity & connections across CWS to improve continuity & integration of work	
Ensure Crew safety	Implement & manage programs to ensure the health, safety & well-being of division staff	
	Partner with Safety to develop additional JSA, safety training & create safety-related SOPs	
	Work with field staff & Safety staff to increase understanding of safety aspects of routine maintenance & construction tasks	
Improve technical support	Partner with GIS (Development Services & DS) to increase reliability of tablets & Lucity data in the field	
	Partner with DS on FO's technology BPI list (create primary list to retain items)	
	Contract IT/Lucity support to fill service level gap	
	Manage partnership between DS & FO to improve collaboration, service & workflow for both groups	

Objectives	Initiative Statements	KSO
Enhance employee engagement	Develop & implement Gallup action plans to improve employee engagement	
ASSET MANAGEMENT		
Maintain high level of service & optimize performance	Implement methods for using data (TV inspection, flow monitoring data & visual inspection) to go from maintenance that is prescriptive to focus on areas of highest priority	
	Implement methods for using data (TV inspection & visual inspection) to prioritize repair & replacement work	
	Develop CMOM document	
FLEET MANAGEMENT		
Fleet operations	Implement high priority recommendations from Mercury's Fleet Optimization Study	
	Develop alternative fuels vehicle policy	
Fleet maintenance, repair & replacement	Conduct 10-year CIP replacement forecasting	
	Monitor annual CIP planning process (October – April) based on rating tool & supply network	
	Monitor fleet rating report process	
OPERATIONS		
Prepare maintenance programs for the future	Integrate FO's maintenance programs for increased connectivity across programs & cross-training	
Maintenance program BPI	Identify & implement BPIs to the maintenance program's workflow to increase efficiency & effectiveness	
Asset management approach to maintaining conveyance systems assets memorialized in a CWS CMOM document	Refine & further develop an asset management approach to maintaining conveyance systems assets including changes to the Performance Standards & collaboration with city partners	
Prepare construction programs for the future	Complete planning & design of new FO construction programs facility	

Objectives	Initiative Statements	KSO
Repair & rehabilitation workflow BPI (AM approach)	Identify BPIs to the construction repair & rehabilitation workflow to increase identification & planning for needed conveyance system repairs	
Support CWS in-house construction needs	Support all CWS departments with construction services when the work is appropriate to be performed in-house	

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Field Operations: Construction

Field Operations Construction includes the System Repair and Local Repair & Construction programs.

These programs perform both Local and Regional maintenance programs for CWS. The Local program includes the areas of unincorporated Washington County; small areas of Multnomah, Clackamas, and Yamhill counties; and the cities of Banks, Durham, Gaston, King City, and North Plains. Local services include emergency response, repairing damaged or deteriorated infrastructure, constructing short line replacements, installing catch basins, and rehabilitating infrastructure.

The Regional program includes the entire service area and all cities. Regional services support repairing and replacing infrastructure at pump stations and water resource recovery facilities and rehabilitating manholes to reduce inflow and infiltration.

Goal

- Provide timely, efficient, and effective services that meet the needs of stakeholders
- Provide maintenance, construction, and fleet services to support operations of public conveyance systems and in-house CWS projects
- Ensure NPDES and MS4 regulatory compliance

Advantage

- In-house construction expertise
- Ability to respond quickly to emergencies and time-sensitive project deliverables
- In-depth knowledge of as-built infrastructure and historical construction practices
- Internal ownership, pride, and attention to detail
- Adopting best practices in technology to enhance service quality and efficiency
- Staying up to date with the latest advancement in technology to remain competitive
- Embracing emerging technologies to enhance service delivery
- Maintaining a highly skilled and knowledgeable workforce

Scope

- Sanitary sewer, storm sewer, and reuse conveyance systems

Value - Added

- Improves performance by reducing costs and saving time through in-house projects for all CWS departments, including fleet, facilities, rehabilitation, conveyance, collections, treatment, reuse, capital projects and maintenance work
- Offers quick and effective immediate fixes; adaptable and ready to handle unexpected challenges
- With specialized knowledge and skills in the construction field, provides internal support to respond to CWS needs more efficiently than going to a contractor
- Project work focuses on maintenance construction and repairs and is funded by Fund 112 or Fund 106
- Collaboration with internal departments and external stakeholders to facilitate more efficient and effective service delivery
- Consistent and positive customer engagement builds brand loyalty and fosters a positive reputation for CWS
- Well-designed emergency management and compliance measures provides a sense of security and confidence for internal and external stakeholders in emergency events (e.g., storms)
- Reliability in core function provides organization with resources and time to focus on business process improvements and innovation

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

Abbreviations

DART: days away, restricted, or transferred
DEQ: Department of Environmental Quality
DS: Digital Solutions
FO: Field Operations
GIS: geographic information system
HDD: horizontal directional drilling
LRC: local repair and construction
MH: manhole
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
NSES: Natural Systems Enhancement & Stewardship department
O&M: operations and management
R&R: repair and replace
RAD: Regulatory Affairs department
RUSD: Regional Utility Services department
SWMP: Stormwater Management Plan
TPS: Treatment Plant Services
TRF: Tualatin River Farm



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADMINISTRATION			
Ensure crew safety			Maintain low levels of DART due to on-the-job injuries
NSES collaboration	Electrical upgrades at TRF	Woodard Park exposed sewer line repair	Fairway Drive exposed main project
WRRD collaboration	Misc R&R construction support	Twin 24s relocation	Misc R&R construction support
Reuse collaboration	Maintenance of NTS Cell 6	Planning for Davis Tool project	Davis Tool project construction
Enhance employee engagement			Develop & implement Gallup action plan for Q01: I know what is expected of me at work
Expand capabilities in trenchless technologies		Demonstrate pit launch HDD machine	Implement use of pit launch HDD machine
SYSTEM REPAIR & CONSTRUCTION			
System Repair (8371) project portfolio management	Establish superintendents meeting between Facilities, Treatment O&M & FO Construction	Monitor opportunities to work collaboratively across program areas to improve delivery of services	
	Provide accurate & defensible cost accounting & cost estimates for in-house project & maintenance work	Monitor cost accounting & cost estimate for in-house & contracted projects	
	Identify opportunities to work collaboratively across program areas to improve delivery of services (establish work request system)		
	Partner with Reuse to test irrigation laterals off existing main to risers at Davis Tool	Partner with Reuse to investigate condition of existing main & risers at Jackson Bottom	Partner with Reuse to finish testing & build irrigation laterals off existing main to risers at Jackson Bottom

Objective	Initiatives		
	FY 24	FY 25	FY 26
LOCAL REPAIR & CONSTRUCTION			
Improve LRC prioritization & identification of repairs	Implement in-field model for high priority & emergency repairs	Implement asset management evaluation results to drive high priority repairs (storm, sani, mainline, laterals)	
		Continue to partner with Development Services-GIS & DS to develop an in-field mapping system for high priority & emergency repairs (similar to rehab, MH sealing & catch basins)	
	Partner with co-implementers, RUSD, RAD, NSES & DEQ to revise catch basin retrofit requirement		
Optimize LRC catch basin permit requirement			Work with stormwater group to update the SWMP catch basin requirement
LRC point repairs & manhole rehabilitation		Evaluate batch work to contract out for identified MH rehabilitation work	

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Safety	Performance measure	DART score	<1.0			<1.0
Catch basin retrofit	Performance measure / Service level	Quantity	30			30
Required Training	Performance measure / Service level	Percentage completed	>95%			>95%
MH rehabilitation	Performance measure / Service level	# of MH rehab completed	100			100
Point repairs	Performance measure / Service level	# of point repairs completed	30			30

Program Roadmap

Organizational Excellence

Contributing to the Region's Environmental & Economic Vitality



FY24-26



Field Operations: Maintenance

Field Operations Maintenance includes the System Maintenance, TV/Flow Monitoring, and SWM Surface Facility Maintenance programs.

These programs perform both Local and Regional maintenance programs for CWS. The Local program includes the areas of unincorporated Washington County; small areas of Multnomah, Clackamas, and Yamhill counties; and the cities of Banks, Durham, Gaston, King City, and North Plains. Local services include emergency response, cleaning and performing TV inspection of storm and sanitary sewer pipes, cleaning catch basins and water quality manholes, sweeping streets, maintaining water quality facilities, and repairing damaged or deteriorated infrastructure.

The Regional program includes the entire service area and all cities. Regional services include managing and maintaining the systemwide flow monitoring and rain gauge network, chemical root control, and maintaining the large diameter (24-inch and larger) sanitary sewer system.

Goal

- Provide timely, efficient, and effective services that meet the needs of stakeholders
- Provide maintenance, construction, and fleet services to support operations of public conveyance systems and in-house CWS projects
- Ensure NPDES and MS4 regulatory compliance

Advantage

- In-house maintenance expertise
- Ability to respond quickly to emergencies and time-sensitive project deliverables
- In-depth knowledge of as-built infrastructure and historical maintenance practices
- Internal ownership, pride, and attention to detail
- Adopting best practices in technology to enhance service quality and efficiency
- Staying up to date with the latest advancement in technology to remain competitive
- Embracing emerging technologies to enhance service delivery
- Maintaining a highly skilled and knowledgeable workforce

Scope

- Fleet, sanitary sewer, storm sewer, and reuse conveyance systems

Value - Added

- Improves performance by reducing costs and saving time through in-house projects for all CWS departments, including fleet, facilities, rehabilitation, conveyance, collections, treatment, reuse, capital projects, and maintenance work
- Offers quick and effective immediate fixes; adaptable and ready to handle unexpected challenges
- With specialized knowledge and skills in the construction field, provides internal support to respond to CWS needs more efficiently than going to a contractor
- Project work focuses on maintenance construction and repairs and is funded by Fund 112 or Fund 106
- Collaboration with internal departments and external stakeholders to facilitate more efficient and effective service delivery
- Consistent and positive customer engagement builds brand loyalty and fosters a positive reputation for CWS
- Well-designed emergency management and compliance measures provide a sense of security and confidence for internal and external stakeholders in emergency events (e.g., storms)
- Reliability in core function provides organization with resources and time to focus on business process improvements and innovation

CWS Values

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Abbreviations

BOO: Business Opportunities & Operations
BUD: beneficial use determination
CB: catch basin
D&C: Design and Construction Standards
DART: days away, restricted, or transferred
DEQ: Department of Environmental Quality
DS: Digital Solutions
FAR: fleet availability rate
GIS: geographic information system
MH: manhole
MPY: Materials Processing Yard (or MHY: Materials Handling Yard)
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
NSES: Natural Systems Enhancement & Stewardship department
NTS: natural treatment system
SWM: surface water management
WQF: water quality facility
WQMH: water quality manhole
WRRD: Water Resource Recovery Operations & Services department



PE Strength & Opportunities



Goal Sharing measure

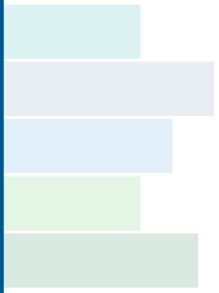
Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADMINISTRATION			
Ensure crew safety (DART)			Maintain low levels of DART due to on-the-job injuries
WRRD maintenance collaboration	Routine maintenance support (monthly sweeps, CB cleaning, line cleaning, routine FOG support, pump station wetwell cleaning)		
NSES maintenance collaboration	Restoring houseless encampments	Training: identifying nonnative, invasive species related to water quality facilities	Review planting pallet for public vegetated WQFs
Reuse maintenance collaboration	Maintain open channel drainage near NTS		
	Maintain NTS collection boxes		
Enhance employee engagement			Develop & implement Gallup action plan for Q01: I know what is expected of me at work
SYSTEM MAINTENANCE			
Improve accuracy of asset System Maintenance (8373) inventory	Monitor key processes for acquiring critical information		
Update System Maintenance service levels	Monitor key processes for acquiring critical information		
	Monitor service level targets for staff that align with Performance Standards expectations		
	Monitor equipment downtime management process	Monitor equipment downtime	
		Meet established Performance Standards	
		Adaptively manage Performance Standards	
		Research & develop public private partnerships to benefit CWS & its customers	
Improve CWS' routine & emergency communications	Evaluate & negotiate partnerships for better regional communications	Identify & procure needed communication hardware to complete communication upgrades	Complete construction of CWS' communication upgrades

Objective	Initiatives		
	FY 24	FY 25	FY 26
TV/FLOW MONITORING			
Provide sanitary & storm sewer TV inspection	Monitor service level targets for staff that align with Performance Standards expectations		
Improve Flow Monitoring program		Adaptively manage Performance Standards	
	Develop Flow Monitoring Strategic Plan	Implement Flow Monitoring Strategic Plan	
Update D&C Standards	Partner with Development Services to prioritize modifications to D&C Standards		
SWM SURFACE FACILITY MAINTENANCE			
Provide street sweeping & WQF maintenance	Provide street sweeping once per month for all streets within regional & local jurisdiction	Monitor service level targets for staff that align with Performance Standards expectations	
	Complete WQF assessment once per year for all public facilities		
Improve accuracy of asset inventory	Evaluate methods for maintaining current level of service with increasing inventory & without increasing staff	Monitor expected service level per Performance Standards for minimum acceptable standard due to increased inventory & available staff hours	
Implement SWM business process improvements	Partner with GIS & DS to plan & implement modification to WQF maintenance tracking in Lucity including color coding maintenance, assessing of WQF, symbolizing tasks & needed equipment		
	Work with BOO on MPY project	Revise BUD sampling plan	Obtain DEQ approval for revised BUD sampling plan
			Work with Construction & Reuse groups to pilot increasing beneficial uses of debris streams generated by FO

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Safety	Performance measure	DART score	<1.0			<1.0
Maintain high level of service & optimize performance	Performance measure	Overflow per 100 miles	<2.0			<2.0
Provide routine collection system maintenance	Service level	Street sweeping	11,550			11,550
	Service level	Vegetation WQF assessments	1,029			1,029
	Service level	Sanitary sewer lines cleaning	930,000			930,000
	Service level	Sumped catch basin cleaning	10,000			10,000
	Service level	WQMH cleaning	1,000			1,000
	Service level	Sanitary sewer TV inspection	515,000			515,000



Water Resource Recovery Operations & Services Department



FY24-26

WRRD

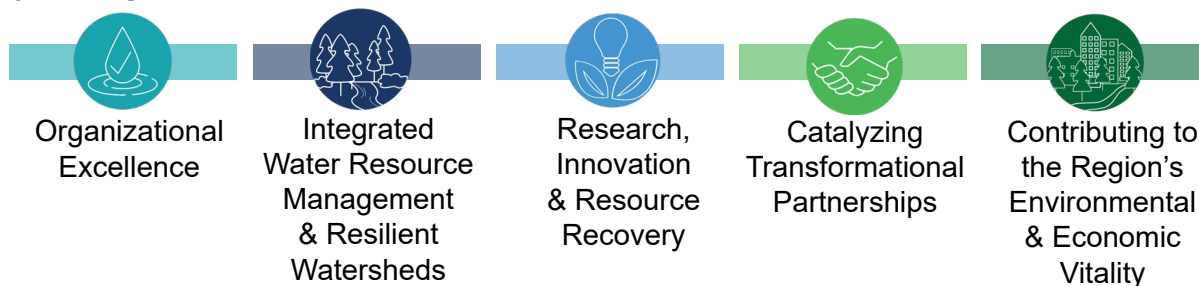
Water Resource Recovery Operations & Services

Full-time employees: 99

Departmental operating budget: \$33,489,100

Water Resource Recovery Facilities Operations & Services is committed to protecting public health and the environment by conveying and treating wastewater efficiently and cost-effectively given the resources available. Our team of professionals provides operations, maintenance, and engineering services for four water resource recovery facilities and 44 pump stations, enabling us to treat over 66 million gallons of water per day. This water is either returned to the Tualatin River or used for irrigation on golf courses, parks, and sports fields. The solids removed during treatment are processed and used as soil amendments on farmland, while the recovered nutrients are sold as a premium fertilizer. Additionally, the digester gas produced during the processing of solids is used as fuel for cogeneration systems that offset approximately 20% of the electrical energy and 70% of the natural gas energy used by our facilities.

Key Strategic Outcomes (KSO):



Abbreviations

CIP: Capital Improvement Program
 CMMS: computerized maintenance management system
 DART: days away, restricted, or transferred
 FOG: fats, oils, and grease
 FTE: full-time equivalent or full-time employee
 GHG: greenhouse gas
 KWh: kilowatt hours
 MG: million gallons
 O&M: operations and maintenance
 PE: Performance Excellence
 PLC: programmable logic controllers
 PMT2: plant maintenance technician 2
 WRRD: Water Resources Recovery Operations & Services department













PE Strength & Opportunities



Goal Sharing measure

Department Service Levels	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
SAFETY				
DART score	<1	0.7	0	0
DEPARTMENT FTE & OPERATING BUDGET STATISTICS				
Million gallons treated per WRRD O&M staff	300	346	350	350
Cost per million gallons treated	\$1000	\$1007	\$1000	\$1000
Power produced in \$ at 7 cents per KWh	\$800,000	\$838,041	\$800,000	\$800,000
Phosphorus recovered (tons)	600	573	650	650
Biogas flared (GHG equivalent in million cubic feet)	100	101	120	120
Natural gas consumed (million therms)	20	25.6	25	25
Chemical costs per million gallons treated (\$ per million gallons)	\$200	\$221	\$200	\$200
FOG revenue	\$950,000	\$948,000	\$970,000	\$950,000
Septic haulers revenue	\$2.5 million	\$2.1 million	\$2.7 million	\$2.7 million
Struvite recovery revenue	\$250,000	\$253,000	\$250,000	\$250,000
Pieces of equipment maintained	14,020	14,062	14,150	14,150
Equipment outages (priority 1&2 work orders)	320	318	400	400
Total gallons used for irrigation (MG)	125	75	112.5	125

Effectiveness & Efficiency Measures	Target	FY 24 Actuals	FY 25 Estimated	FY 26 Estimated
Energy neutral (electricity) cogen + solar	40%	20%	30%	40%
Energy produced/million gallons processed (KWh/MG)	400	333	400	400
Phosphorus recovered Crystal Green (tons)	600	573	650	650
Number of sewer overflows at pump station or force main	0	0	4	0

Objectives	Initiative Statements	KSO
ADMINISTRATION		
Improve safety	Focus to drive DART score to less than 1.0 addresses PE Opportunity for Improvement 6.2(1) on having a systematic process to measure success in safety	
Program management	Provide general & fiscal management of programs.	
Stabilize staffing levels & planning	Develop Operations staffing plan to predict & improve staffing levels.	
Employee engagement	Use Gallup to gauge & demonstrate employee engagement with a continual improvement focus.	
Interdepartmental collaboration	Foster cross-departmental teamwork & financial benefit/cost reduction	
TREATMENT FACILITIES O&M		
Enhance succession planning, workforce development & career path development	Implement an electrical & instrumentation apprenticeship program to enhance succession planning, workforce development & career path development for positions requiring specialized skills	
	Develop internship from trainee to career programs for the PMT2 & Operator 2 program	
	Develop staff for leadership roles & career development at CWS	
Increase plant reliability	Revisit CMMS data structure to enhance asset management & CIP reference data	
ASSET MANAGEMENT		
Identify & replace aging equipment	Evaluate & replace critical equipment related to operating technology for regulatory compliance (i.e., PLCs)	

Program Roadmap

Organizational Excellence

Research, Innovation, & Resource Recovery



FY24-26



Resource Recovery Facilities Operations & Maintenance

Resource Recovery Facilities Operations & Maintenance operates and maintains CWS' four water resource recovery facilities and 44 pump stations.

Goal

- Provide timely, efficient, and effective wastewater treatment services that meet the needs of stakeholders
- Treat and convey wastewater by the best means possible given the resources available

Advantage

- Collaborative work environment with experienced and passionate employees
- State-of-the-art facilities, in-house expertise, and consultant support
- Flexible permit compliance and innovative problem-solving
- Good relationships with development community for sustainable infrastructure operations
- Results-oriented, recognized for achievements and technology implementation
- Led by visionary leadership, dedicated to county service district mission

Scope

- Treatment facilities and Tualatin River Watershed

Value - Added

- Provide a safe working environment
- Meet regulatory requirements and long-term compliance
- Recovery resources
- Provide consistent and reliable services
- Meet an uncertain future with certainty

Abbreviations

ADM: anaerobically digestible material
BPM: biological phosphorus removal
BPOP: business performance and optimization projects
CMMS: computerized maintenance management system
cogen: cogeneration
Cu: copper
DART: days away, restricted, or transferred
DEQ: Department of Environmental Quality
DM: Durham
DSG: dispatchable generation
EATS: Enterprise Asset & Technical Services department
E&I: electrical and instrumentation
ES: Environmental Services

CWS Values

We're dedicated to the river, our communities, and each other.

We're guided by science.

We make great things happen by working and solving problems together.

FG: Forest Grove
 FOG: fats, oils, and grease
 FTE: full-time equivalent or full-time employee
 FY: fiscal year
 GHG: greenhouse gas
 GS: Goal Share
 HB: Hillsboro
 I&I: inflow and infiltration
 KWh: kilowatt hours
 Lab: Laboratory Services
 mg: million gallons
 MGD: million gallons per day
 NACWA: National Association of Clean Water Agencies
 NO₂: nitrite
 NO₃: nitrate
 NTS: Natural Treatment System
 O&M: operations and maintenance
 OSP: Operations Staffing Plan
 PFAS: per- and polyfluoroalkyl substances
 PLC: program logic controller
 PM: project manager
 PS: pump station, pump stations
 R&I: Research & Innovation
 RAD: Regulatory Affairs department
 RC: Rock Creek
 RRF: Resource Recovery Facility
 ripl: Research+Innovation+Partners+Labs
 RNG: renewable natural gas
 RUSD: Regional Utility Services department
 RV: recreational vehicle
 SCADA: supervisory control and data acquisition systems
 SOP: standard operating procedure
 TSS: total suspended solids
 TTM: TTM Technologies
 UAS: uncrewed aerial system
 UFAT: unified fermentation and thickening
 UGB: Urban Growth Boundary
 UOPS: Utility Operations & Services department
 UV: ultraviolet
 VFA: volatile fatty acids
 WASSTRIP: Waste Activated Sludge Stripping to Remove Internal Phosphorus
 WRRD: Water Resources Recovery Operations & Services department






PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 24	FY 25	FY 26
ADMINISTRATION			
Ensure a safe workplace		Maintain a DART score of <1	
Operations staffing plan		Create first draft of OSP & submit during budgetary process for FTE requests	Review & revise OSP & submit during budgetary process for FTE requests
Gallup poll Replace & upgrade program logic controllers	Use Gallup to gauge & demonstrate employee engagement with a continual improvement focus		
	Use Gallup tools to increase employee engagement focusing on Question 1 “I know what is expected of me at work”	Use Gallup tools & new action plan to increase employee engagement focusing on Question 1 “I know what is expected of me at work”	Refocus as needed with new Gallup results to further increase engagement scores
Field Operations collaboration	Foster cross-departmental teamwork & financial benefit/cost reduction	Collaborate on construction projects & site maintenance located at RRFs & PS	
NSES collaboration	Foster cross-departmental teamwork & financial benefit/cost reduction	Evaluate opportunities to coordinate UAS flights to assist with understanding of gaseous emissions at RRFs	
Reuse collaboration	Provide reuse water from DM to customers. Help plan to provide reuse water from RC	Provide reuse water from DM & RC to customers. Help plan to provide reuse water from FG/NTS for onsite use	
RAD/LAB/ES collaboration	Foster cross-departmental teamwork for laboratory testing, regulatory compliance reporting & industrial pretreatment		
TREATMENT & PUMP STATION PROGRAMS			
Optimize methane production for beneficial use	Increase digester gas production capacity to improve cost-effectiveness of renewable natural gas efforts	Obtain renewable energy credit for reducing GHG emissions	Further design gas use at RC & determine if cogen or other system will go into construction
		Investigate ways to beneficially use methane & minimize flaring of methane	
Maximize biological phosphorus removal	Improve UFAT operations to increase capacity & redundancy of processes (convert WASSTRIP tanks to UFAT)		Optimize UFAT operations

Objective	Initiatives		
	FY 24	FY 25	FY 26
Maximize biological phosphorus removal		Investigate VFA/nitrates in DM collection system impacting BPM	
Maximize Ostara process & achieve production targets		Refine operations SOPs & preventative maintenance times to reduce downtime	
Odor control optimization treatment & PS programs		Track & investigate odor complaints for permanent solutions	
Reuse water production	Provide an uninterrupted supply of reuse water to customers		
Maximize renewable energy production		Work with O&M & vendors to maximize boiler, generator uptime, Ostara production, solar uptime	
Operational performance tracking		Track key performance points for reference	
Permit compliance	Test HB primaries as surrogate for FG to help size FG units; design primary clarifier to align with capacity & permit expectations for Cu	FG: Construct primary clarifier to align with capacity & permit expectations for Cu	FG: Optimize operation of new primary clarifiers & existing treatment system
	FG: Conduct systems planning for master plan for ripl, Fernhill North, PS TTM, 30-inch line & FG data center		FG: Implement defined plan
	FG: Improve understanding of wetland characteristics to align with permit compliance requirements	FG: Refine monitoring & response strategies	FG: Continue to refine monitoring & response strategies for TSS & thermal challenges
	DM: Investigate poor effluent filter performance	DM: Define issue with effluent filters & correct by 2025 permit season to meet .1 phosphorus	Memorialize & create a plan for filter maintenance based on lessons learned from FY24-25
PS instrumentation consistency (GS)	Identify needed instrumentation 	Begin to analyze how to close the gap between what we have & what we need 	Plan & budget higher-cost instrumentation upgrades to stations 

Objective	Initiatives		
	FY 24	FY 25	FY 26
ASSET MANAGEMENT			
Evaluate & improve plantwide SCADA & administrative network	Partner with Automation & Controls on SCADA & administrative network configuration & condition improvement		Further partner with DS to increase reliability of the SCADA network & servers
Replace & upgrade PLCs		Partner with Automation & Controls to migrate RC PLC4	Continue to replace aging PLCs in priority order
Revisit CMMS data structure to enhance asset management		Engineering & O&M collaborate on Lucity enhancements	Create reporting tool to assist in auditing assets & craft performance
PS analyze aging equipment & determine replacement strategy		Identify & replace aging engine – generators at PS sites	Further analyze & prioritize replacing critical aging infrastructure (control panels, generators, etc.)

Table 2: Service Level & Performance Measures

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Ensure a safe workplace	Performance measure	DART score	<1.0	0	0	0
UOPS	Service Level	Treatment site support for Vactor/Jetter work	1050 (in hours)	1100 hrs	1200 hrs	1000 hrs
	Service Level	Support weekly coordinated PS wet well cleaning efforts	700 (in hours)	725 hrs	700 hrs	750 hrs
	Service Level	Support Fernhill NTS maintenance efforts, preseason & as needed with Vactor support	160 (in hours)	120 hrs	160 hrs	160 hrs
	Service Level	Support Fernhill road ditch maintenance effort	30 (in hours)	30 hrs	30 hrs	40 hrs
ES	Service Level	Lead investigation of plant upsets from influent streams	6	# instances from Rapid Response page on SharePoint (2)	# instances from Rapid Response page on SharePoint (2)	# instances from Rapid Response page on SharePoint (2)

Objective	Metric	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Lab	Service Level	Support weekly lab sampling & testing of process & regulatory samples to demonstrate NPDES compliance	24,000	22,666	24,040	25,000
Optimize methane production for beneficial use	Performance measure	Biogas flared (GHG equivalent)	150 million	150 million	150 million	150 million
	Performance measure	Natural gas consumed (therms)	150,000	150,000	155,000	155,000
	Performance measure	ADM revenue	\$500,000	\$428,000	\$700,000	\$700,000
Reuse water production	Performance measure	Total gallons used for irrigation (million)	75	93	83	75
	Performance measure	Reuse water applied	80	82	72	80
	Performance measure	Reuse reliability (keeping reuse online (operations) & reliability) no. days offline	0	3	3	3
Operational performance tracking	Service Level	Max peak hour treatment facility flow (qmax)	<300MGD	<300MGD	<300MGD	<300MGD
	Performance measure	Platinum NACWA awards	3	3	2	3
	Performance measure	Gold NACWA awards	1	0	1	1
	Performance measure	Silver NACWA awards	0	1	1	0
	Cogen power produced	Dollars generated by cogen		\$793,782	\$800,000	\$800,000
	Solar power produced	Dollars generated by cogen	\$43,000	\$44,258	\$43,000	\$43,000
	Performance measure	FOG/ADM/RV dump revenue	\$50,000	\$50,000	\$50,000	\$50,000
	Performance measure	Dollars of chemicals used per MGD treated	\$225	\$202.80	\$250	\$250
	Performance measure	Millions of Gallons Treated (from DMR)	28,000	27,909	28,000	27,000
Revisit CMMS data structure to enhance asset management	Performance measure	Equipment outages (priority 1&2 work orders)	<350	430	400	400

