

Clean Water Services FY 2025 - 2027

Department & Program Roadmaps

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FY25-27

Government Affairs

Government Affairs leads CWS' state and federal government relations, legislative advocacy, and strategic grants management. The program builds awareness, support, and credibility with key opinion leaders, state and federal agency staff, legislative staff, and elected officials. Government Affairs also works with policymakers, funders, and partners to secure external funding to advance CWS' mission. Core activities include developing legislative priorities, advocating in Salem and Washington D.C., coordinating policy and funding strategies across the enterprise, pursuing competitive grants, supporting grant reporting, and building coalitions that strengthen environmental and community outcomes.

Goal

- Advance critical advocacy and strategic funding that achieve CWS goals, including strengthening our community, protecting the Tualatin River, and elevating brand credibility and our role as an industry leader.

Advantage

- Longstanding relationships in Salem and with Oregon's congressional delegation
- A collaborative, solution-focused approach that advances CWS policy priorities
- Deep expertise in advocacy and how legislation affects CWS operations and obligations
- Strong credibility in championing science-based policy and elevating CWS' voice
- Proven ability to shape laws and secure public resources for the benefit of CWS ratepayers, the Tualatin River, and surrounding communities
- External funding that lowers future ratepayer costs while accelerating core initiatives
- Centralized grant coordination that strengthens efficiency, consistency, and compliance across the enterprise
- Influential, competitive positioning through technical expertise, strategic partnerships, and project readiness
- Ability to capitalize quickly on emerging funding opportunities
- Transparent governance with robust controls, reporting, and risk mitigation
- Increased credibility with funders and partners through reliable delivery of grant commitments

Scope

- Work with CWS staff, leadership, and Board, on an annual basis, to develop state and federal legislative agendas, including legislative principles and priorities
- Foster relationships and engagement with key partners, state agencies, associations, and coalitions to enhance advocacy efforts and outcomes
- Build understanding of CWS operations, priorities, and legislative positions with state legislators and federal congressional offices, including through tours and briefings, and position CWS as a trusted voice in wastewater and stormwater
- Monitor the introduction of state and federal legislation that may impact CWS and engage in strategic advocacy efforts that align with board-adopted principles and priorities
- Coordinate with CWS staff to solicit technical and strategic input on legislation, administrative rules, and other policies that may impact CWS
- Lead development and submission of competitive, high-quality grant applications
- Manage grant documents, approvals, budgets, and compliance requirements
- Track grant budgets, ensure adherence to state, federal, and funder rules, and support audits
- Oversee reporting and grant closeout to ensure timely, accurate delivery of obligations
- Build and maintain enterprise-wide systems for grant governance, controls, and data integrity
- Strengthen organizational competitiveness and readiness for external funding
- Manage grantor relationships and communicate critical updates and deliverables
- Foster a collaborative, inclusive, and multidisciplinary culture aligned with CWS values

Value - Added

- Educate and inform decisionmakers with clear, actionable information that improves policy outcomes
- Advance and defend laws, policies, and funding streams that support CWS priorities
- Proactively cultivate strategic relationships and expand understanding of CWS' mission and needs
- Secure external funding that offsets ratepayer costs
- Increase investments in water quality, climate resilience, and essential infrastructure
- Ensure strong accountability, full compliance, and efficient use of public funds
- Enhance CWS' credibility and partnerships through consistent, high-quality grant performance

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

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
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		Monitor & advocate for BOR progress on structural modifications to Scoggins Dam. Coordinate with federal delegation to enhance advocacy efforts, including project & programmatic funding Work strategically & collaboratively with regional partners, federal delegation & BOR to avoid/oppose potential reductions in stored water capacity at Hagg Lake
Establish & maintain positive government relations with federal, state & local governments	Increase understanding & engagement level with stakeholders & partners		
	Participate in DC Fly-In		Participate in DC Fly-In as appropriate for advancing CWS legislative agendas
	Conduct tours of CWS facilities & Scoggins Dam		Conduct tours, including with elected officials & staff, 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		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Strengthen CWS knowledge & advocacy 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	
Grant Acquisition & Revenue Growth	Develop project readiness capacity to position CWS for grant opportunities	Operationalize FY25 Foundation: Implement grant tracking protocols and analyst capacity established in FY25 Set Revenue Targets: Establish annual grant revenue targets totaling \$2M in requests	Scale Revenue Targets: Pursue \$3M in total grant requests across the enterprise, aligned with organizational capacity & project readiness
	Hire Grants Analyst & establish internal protocols for tracking grant awards	Set Revenue Targets: Align targets with CIP, strategic plan & organizational capacity Develop Multiyear Grant Pipeline: Identify high-probability opportunities aligned with the CIP & strategic plan & coordinate with Finance & Project Management on readiness and timing	Scale Revenue Targets: Adjust departmental targets based on FY26 performance & emerging opportunities Execute Multiyear Pipeline Strategy: Coordinate 18-month advance project readiness with departments to submit phased, multiyear applications & track & pursue anticipated recompetitions from FY26 awards
		Pursue Multi-Partner Regional Opportunities: Participate in 3 collaborative applications with regional partners where CWS contributes technical expertise, match, or project management capacity	Lead Regional Collaborative Applications: Selectively lead up to 1–2 regional collaborative applications, serving as lead applicant or fiscal agent where capacity, risk & administrative support are aligned & leveraging CWS credibility to anchor regional projects

Objective	Initiatives		
	FY 25	FY 26	FY 27
Grant Acquisition & Revenue Growth		<p>Lead High-Quality Application Development: Submit competitive applications; incorporate lessons learned from unsuccessful FY25 applications</p>	<p>Optimize Grant Strategy Based on Data: Analyze FY25-26 capture rates by funder type & project category; refine pursuit resources toward highest-probability opportunities; identify corrective strategies for underperforming grant programs</p>
Grant Stewardship & Compliance Excellence		<p>Operationalize Grants Authorization Process: Achieve 95% of grant applications processed through grant authorization workflow (established in FY25)</p> <p>Operationalize Grants Authorization Process: Train 2 departments on grant authorization requirements & project readiness criteria</p> <p>Operationalize Grants Authorization Process: Track grant authorization processing times & hold quarterly improvement reviews to reduce delays, clarify requirements & streamline approval steps</p> <p>Launch Active Grants Data Dashboard: Implement enterprise-wide system tracking budgets, expenditures, match utilization, reporting deadlines & capture rates; require monthly data entry by project managers</p>	<p>Optimize Grant Authorization Process: Target 98% compliance with grant authorization workflow</p> <p>Optimize Grant Authorization Process: Reduce average processing time by up to 20% through process improvements</p> <p>Optimize Grant Authorization Process: Begin integrating grant authorization with enterprise project prioritization to align grant pursuit with strategic capacity</p> <p>Enhance Dashboard Analytics: Pilot enhanced analytics, including trend analysis for grant capture rates, expenditures & match utilization</p>
FY27 initiatives are intended to be implemented in phases based on staffing capacity, data maturity & organizational readiness			

Objective	Initiatives		
	FY 25	FY 26	FY 27
<p>Grant Stewardship & Compliance Excellence</p> <p>FY27 initiatives are intended to be implemented in phases based on staffing capacity, data maturity & organizational readiness</p>		<p>Launch Active Grants Data Dashboard: Produce quarterly executive summary for leadership showing active portfolio value, expenditure rates, upcoming deadlines, at-risk projects, new awards & closeouts</p>	<p>Enhance Dashboard Analytics: Implement alerts for approaching deadlines or budget issues & enhance visual dashboards to identify at-risk grants & support leadership decision-making</p>
		<p>Standardize Post-Award Management: Conduct grant kickoff meetings within 30 days for 80% of new awards</p>	<p>Achieve Post-Award Excellence: Reach 85% on-time kickoffs (within 30 days)</p>
		<p>Standardize Post-Award Management: Provide project managers with standardized tool kit (budget trackers, reporting templates, audit checklists, milestone trackers)</p>	<p>Achieve Post-Award Excellence: Achieve 95% of grants with complete post-award documentation within 45 days</p>
		<p>Standardize Post-Award Management: Schedule midpoint check-ins for all multiyear grants</p>	<p>Achieve Post-Award Excellence: Reduce grant close-out time by 25% through improved project tracking</p>
		<p>Centralize Letters of Support Workflow: Route 95% of requests through Office of CEO using standardized process with 5-day turnaround; maintain library tracking commitments to prevent conflicts</p>	<p>Implement Enterprise Match Strategy: Develop comprehensive tracking system preventing double-counting; establish match “bank” identifying eligible contributions and staff time</p>
		<p>Ensure Compliance and Timely Reporting: Submit 95% of grant reports on time; maintain audit-ready documentation for all active grants</p>	<p>Implement Enterprise Match Strategy: Develop & test an allocation framework for distributing limited match resources in coordination with Finance & departments</p>

Objective	Initiatives		
	FY 25	FY 26	FY 27
<p>Grant Stewardship & Compliance Excellence</p> <p>FY27 initiatives are intended to be implemented in phases based on staffing capacity, data maturity & organizational readiness</p>		<p>Build Grant Management Capacity: Develop FAQ resources and establish community of practice for project managers</p>	<p>Establish Grant Portfolio Management Discipline: Introduce quarterly portfolio reviews with executive leadership to assess portfolio balance & inform decisions on program pursuit & renewal</p>

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Draft, vet & implement comprehensive federal & state legislative agenda	No. bills tracked – long session	15%	18.7% 637 bills tracked out of 3,401 (2025 session)	N/A	15%
	No. state legislative session bills tracked – short session	15%	N/A	15%	N/A
	Long session: No. of state legislative session bills introduced that reflect proactive CWS legislative priorities	100%	100%	N/A	
	Short Session: Engage in efforts that seek to advance proactive CWS legislative priorities	85%	N/A	100%	
	Partnerships leveraged for improved advocacy outcomes	6	12 (SDAO, ACWA, LOC, AOC, Hillsboro, Beaverton, Washington Co, Public Contracting Coalition, Environmental Council, Craft 3, Center for Sustainable Infrastructure, Water Caucus)	10	10
Establish & maintain positive government relations with federal, state & local governments	Key legislator tours or one-on-one briefings	75%	75%	75%	75%

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Strengthen workforce capacity in the legislative process by enhancing technical support through improved engagement & targeted training	Develop an internal legislative liaison structure within CWS	Development of one internal team for each legislative session	Established in summer of 2025 for the 2026 session	Passport session on legislative engagement	
Grant acquisition & revenue growth	Total external funding requested	\$3M	0	\$2M	\$3M
	Number of applications submitted	10	0	8-10	10-12
	Multi-partner applications (CWS participant)	2	0	3	2
	CWS-led regional applications	1	0	0	1-2
	Grant capture rate	70%		65%	70%
	New grantor relationships cultivated	5	0	3-5	3-5
	Applications through grant authorization process	95%		95%	98%
	Dashboard adoption (active data entry)	100%		100%	100%
	Grant kickoffs within 30 days	85%		80%	85%
	Complete post-award docs within 45 days	95%		85%	95%
	Letters of support through CEO workflow	95%		95%	98%
	On-time grant report submission	95%		95%	98%
	Departments trained on grant systems	3	0	2	4
	Audit findings (for any audited grants)	0		0 material findings	0 material findings
	% of grant applications utilizing match tracking system	75%		75%	100%



FY25-27

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, and 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

Abbreviations

CIP: Capital Improvement Program

EMC: Emergency Management Cooperative

EOP: Emergency Operations Plan

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 25	FY 26	FY 27
PROVIDE RESOURCES & SUPPORT TO INDIVIDUAL WORKERS TO BOOST THEIR FAMILY & PERSONAL PREPAREDNESS			
Ensure the CWS workforce has the knowledge, resources & support to prepare for disasters at home & at work	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 & PRIVATE ORGANIZATIONS			
Establish & maintain an incident management team of CWS employees, providing support, training opportunities, discussion-based & functional exercises to evaluate the EOP	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		
Collaborate with staff to manage primary, alternative, contingent & emergency communication methods	Support radio drills		
	Use Regroup to manage emergency notifications of the CWS workforce		
Participate in planning & coordination efforts with the Regional Disaster Preparedness Organization	Emergency Manager attends public works work group		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Participate in planning, exercising, responding & recovery activities with Washington County's EMC / County Emergency Operations Center	Emergency Manager attends Washington County EMC meetings		
Ensure mutual aid agreements are aligned with CWS response & recovery approach	Manage ORWARN agreement, CPAWC IGA & ORCAA		
ENSURE CWS HAS DATA & INFORMATION TO MAKE SCIENCE-BASED DECISIONS ABOUT HOW TO MANAGE OUR CRITICAL INFRASTRUCTURE'S RESILIENCY TO DISASTER CONDITIONS			
Partner with Washington County in multijurisdictional natural hazard mitigation planning process	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	
ESTABLISH AN EOP THAT REFLECTS THE MISSION, VISION & VALUES OF CWS WHILE PROVIDING GUIDANCE TO RESPONDERS ON MANAGEMENT SYSTEMS & RESOURCES REQUIRED TO FULFILL OUR PERMIT REQUIREMENTS UNDER DISASTER CONDITIONS			
Manage & maintain EOP	Convene ad-hoc collaboration & conversations to determine content of EOP's base plan & related annexes		

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Ensure CWS workforce has knowledge, resources & support to prepare for disasters both at home & at work	% of workforce that agrees they would be able to return to work within a week of a catastrophic disaster	85%	15%	30%	
	# of Ready campaign activities	12		12	10
Manage & maintain EOP	# of chapters updated in EOP base plan	7		7	



FY25-27

BO

Business Operations

Full-time equivalents: 38

Departmental operating budget: \$16,239,700

The groups in the Business Operations department support CWS in delivering exceptional services to customers by overseeing and coordinating key areas of business administration, business development, building and facilities management, initiatives to improve access and opportunity, process optimization, risk management, safety, culture development, strategic planning, and training. BO comprises five programs: Administrative Services; Culture & Development; Building & Facilities Services; Risk & Insurance Management; and Safety.

Key Strategic Outcomes (KSO):



Abbreviations

CWIC: Clean Water Insurance Company

LMS: learning management system

PM: preventative maintenance








PE Strength & Opportunities








Goal Sharing measure

Department Service Levels	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
# of claims managed	50	60	60	
# of Safety audits	68	22	52	
CWIC fiscal year ending fund balance	\$10,000,000	\$6,600,000	\$8,200,000	

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Gallup Q12 engagement score for organization (grandmean)	4.2	4.0	4.1	4.1
% of workforce engaged in learning activity	100%	LMS review begins	25%	25%
# of Facilities preventative maintenance work orders	2,000	1,886	2,000	
# Facilities corrective maintenance work orders	1,510	1,325	1,510	
% of compliance found in safety audits (baseline needed)	100%	80%	90%	

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 & DEVELOPMENT		
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.	
Inclusive workplace	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.	

Objectives	Initiative Statements	KSO
FACILITIES		
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		
Employee health, safety, and well-being	Implement programs and initiatives to ensure the health, safety, and well-being of all CWS employees.	



FY25-27

Culture & Development

The C&D 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 engagement, integrates access and opportunity 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 growth and cross-departmental connections.
- Strong relationships among program staff and CWS employees

Scope

- CWS workforce, board, community partners, and consultants

Value - Added

- Sustain and improve employee engagement
- Support access and opportunity for CWS staff
- Grow CWS as a learning organization

Abbreviations

ABC: Administrative Building Complex
BP: Business Partners
CCE: Communications & Community Engagement
C&D: Culture & Development
CEO: Chief Executive Officer
CVI: Core Values Index
DS: Digital Solutions
EAC: Employee Advisory Council
ELT: Executive Leadership Team
ERG: employee resource groups
GEN: Gender Equity Network

GIS: geographic information system
GM: General Manager
HR: Human Resources
LMS: learning management system
MCC: Multicultural Committee
OD: organizational development
SAGE: Strategic Advisory Group to the Executive
SME: subject matter expert
Spark: Neurodiversity Network
VET NET: Veterans Network

Definitions

Clean Water LEADERS: A CWS employee leadership development program that supports emerging CWS leaders in growing their skills, building peer connections, and exploring leadership through six in-person sessions over five months. Topics include strengths, communication, strategic thinking, inclusion, self-awareness, and resilience.

Spark: An employee interest group created by employees to enhance business operations by promoting understanding of neurodiversity in the workplace and supporting neurodivergent staff across the organization. The goal is for every employee to have resources to handle neurodiversity in the workplace and with external customers and vendors.



Goal Sharing measure




PE Strength & Opportunities

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
CULTURE			
Increase employee engagement	Assessment: Implement employee engagement survey		
	EAC: Implement work plan focused on building connections among individuals & groups. Keep group running successfully through participant changes	Continue building connections, responding to executive team requests (including input on next CEO/GM), following up on EAC recommendations, heightening EAC member visibility.	Continue building connections, responding to executive team requests, learning, closing loops & adaptively managing
		Initiation and discovery for Roadmap Redux	Implementation of changes for Roadmap Redux
		Implement & evaluate signature project, Connections 2025, then hand off & identify 2026 signature project	
		Strengthen learning component through first EAC retreat. Adjust EAC structure as needed with policy & leadership changes	
	Continue & enhance Passport peer-to-peer learning	Continue Passport peer-to-peer learning with available topics	
	Refine values & integrate into existing policies & programs	Continue to integrate values into new & existing policies, programs & systems	Assess feasibility of revisiting written mission & vision (as the values were revisited in FY24)
		Lead, plan, implement & evaluate a CWS-wide event: Making Great Things Happen: An Employee Innovation Showcase	Lead, plan, implement & evaluate a second CWS-wide event: Making Great Things Happen: An Employee Innovation Showcase
	Help manage & support BP meetings, including creation of BP Connection	Guide design & management of four annual meetings of senior managers group	Support management of senior managers group


Objective	Initiatives		
	FY 25	FY 26	FY 27
Improve CWS employee communications	Continue planning & implementation to create intranet	Support the development of the CWS intranet, including employee engagement in the project	Support implementation of the CWS intranet
	Develop & implement tactics for CEO & SAGE connection with employees, including written messages, all-staff conversations & more	Review, refine & recommend tactics for CEO & ELT communication & engagement. Draft written messages & talking points. Create employee engagement & communication plan for recruitment & onboarding of new CEO/GM & assist with implementation	Continue to review, refine & recommend tactics for GM & ELT communication & engagement. Draft written messages & talking points. Partner on employee engagement and communication plan for new GM.
		Develop, for consideration by Policy Steering Committee, proposal for consistent, scalable rollout strategy for new & revised policies.	Consult with contact person for each new/ revised policy; recommend specific, audience-appropriate rollout tactics and timing.
	Support Pipeline content development	Function as SME for content related to organizational culture, organizational learning & access & opportunity in Pipeline & other channels. Improve information provided to employees about C&D program	
	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	In partnership with CCE, continually update “menu” of employee communication channels & advise SMEs on how to choose their channels. Collaborate with CCE on an employee comms toolkit
	Begin communication & engagement strategy for employees who are involved in ABC relocation	Help create communication & engagement strategy for employees who are involved in relocation to CWS Central	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Improve employee experience	Continue implementing onboarding program; survey each cohort to learn of possible improvements. 	Continue implementation with improvements included. Survey each cohort for ongoing knowledge & improvements	Continue implementation with ongoing evaluation & improvements included. Refine ongoing experience to tailor to audience & business needs
	Create & curate resources for onboarding participants & make them readily available to all employees		
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	Continue conversation with HR about internal people development strategies & leadership training
ACCESS AND OPPORTUNITY			
Create & elevate spaces for access and opportunity in CWS culture	Support ERGs (GEN & MCC), including the VET NET	Provide staff support around publicity, leadership development, event planning & more – for existing ERGS (GEN, MCC & VET NET) & new ERG (Spark). Assist with sunsetting of ERGs & transition to Network model.	Consider access & opportunity aspects in all activities with employee groups. Make basic contact info for Networks available to all employees.
	Offer learning related to increasing access & opportunity for all staff		
	Support & advise on community & partner engagement that creates space for access & opportunity for all		
	Co-manage equity mapping process to provide evidence-based GIS data to inform projects & programs	Support acceptance, integration & use of CWS equity mapping tool	
Co-create & help report on Access & Opportunity metrics that align with four desired focus areas	Procurement		Explore whether these focus areas will be tracked & reported to the CWS Board
	Culture, equity lens (managed by CEL)	Culture & development lens (managed by C&D)	
	Internships, apprenticeships (managed by departments)		
	Hiring, recruitment, retention (managed by HR)		

Objective	Initiatives		
	FY 25	FY 26	FY 27
LEARNING			
Develop & grow organizational learning program	Refine & implement strategic organizational learning priorities as an integrated, enterprise-wide program	Maintain & continue to provide current learning offerings. Evaluate & adjust those offerings. Refine priorities to reflect needs of the organization, using feedback from & alignment with Learning program team	Maintain & continue to provide current learning offerings. Evaluate & adjust those offerings. Refine priorities to reflect needs of a maturing program
	Create ideas to embed, celebrate & integrate learning into CWS culture		Develop written strategy to embed, celebrate & integrate learning into CWS culture
	Offer integrated equity learning	Offer integrated & embedded learning related to access & opportunity as it applies to all staff	
	Refine & continue Clean Water LEADERS program	Refine & continue Clean Water LEADERS program, possibly creating new versions to respond to employee needs	Refine & continue Clean Water LEADERS program
	Identify, create & expand organizational learning priorities, including project management, supervisor skills, onboarding & leadership	Identify & expand organizational learning priorities. Create new curricula as needed. Help lead project management training program, lead onboarding program, advise on supervisor training & create new learning programs to address need for knowledge transfer & other topics	Identify & expand organizational learning priorities. Create new curricula as needed. New priorities could include specialized leadership skills training, change management & other topics
	Evaluate LMS currently in use & determine options. This includes review of user needs, partnership with DS, & market research	Seek & evaluate vendor possibilities for LMS retention or replacement, co-leading collaborative process with user committee.	With user committee & partnership with DS, choose LMS that offers the most value to CWS. Implement LMS choice
		Increase Project Management Maturity – teach courses on project management, mentor staff, manage and/or support cross-departmental strategic projects	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Build staff knowledge of best people management practices	Promote supervisor use of employee engagement survey data, Gallup Access tools, track action plans & work with ELT to support		Promote supervisor use of Gallup Access tools, track action plans & work with ELT to support. Offer additional learning sessions on best management practices. Provide team leadership training & support as needed
	Offer CVI & other talent assessment trainings to new staff	Offer optional use of CliftonStrengths talent assessment, including integration with Gallup employee engagement data & tools	Continue to offer facilitated sessions with CliftonStrengths to build collaborative teams & self-knowledge
Develop climate strategic roadmap & implementation plan	Update Climate Action Strategic Roadmap with revised strategic objectives & strategic initiatives		
	Develop implementation plan for strategic roadmap for effective integration into department & program roadmaps		

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
CULTURE Increase employee engagement	Participation in employee engagement survey	84% in FY27/28	71%	80%	83%
	Overall employee engagement measurement in Gallup survey	4.0 in FY 27/28	Grandmean of 3.89	Grandmean of 3.95	Grandmean of 4.0
	EAC meetings & coordinating committee meetings; EAC evaluation responses	75% positive eval in FY27/28	80% positive evaluation responses for EAC meetings Completed annual report for SAGE	75% positive evaluation responses for EAC meetings ELT member in attendance 2 out of 4 meetings.	75% positive evaluation responses for EAC meetings
	Improve new employee experience	Onboarding will move into a maintenance mode	Implement & evaluate four cohorts or organizational onboarding 	Refine onboarding in at least three ways as a result of participant feedback	Maintain & improve onboarding process
ACCESS & OPP-ORTUNITY	Access & Opportunity learning for workforce	Three access & opportunity learning opportunities per year in FY 27/28	Two optional access & opportunity learning opportunities offered to all staff One access & opportunity learning session provided as part of Clean Water LEADERS program	Two optional access & opportunity learning opportunities offered to all staff One access & opportunity learning session provided as part of Clean Water LEADERS program	Two optional access & opportunity learning opportunities offered to all staff One access & opportunity learning session provided as part of Clean Water LEADERS program
LEARNING Develop & grow organizational learning program	Percentage of employees involved in learning program (as measured in LMS)	100% in FY 30/31	LMS review begins to measure efficacy of tool	LMS review continues & evaluation of vendors begins	LMS tool selected/ refined. Define “learning program.”

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
LEARNING Develop & grow	CliftonStrengths pilot project	50% of teams use		Two teams receive training on Clifton Strengths	Four teams receive training on Clifton Strengths
	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>Two 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. Plan for, hire consultants & train the trainers to deliver project management certification training.</p>	<p>One Clean Water LEADERS session started in calendar year. Full evaluation done on Clean Water LEADERS program, resulting in recommendations for changes or improvements. Those improvements partially begin in calendar year. Supervisor training continues to evolve with assistance of Learning Coordinator. Organizational onboarding serving all new regular employees. Pilot project management professional certification training.</p>	Clean Water LEADERS changes implemented.
					Determine next steps to increase CWS project management maturity based on feedback from first cohort



FY25-27

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

PO: purchase order

SLA: Service Level Agreements

SOP: standard operating procedure

CBOO: Chief Business Operations Officer



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
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 policy review & implementation process	
	Develop consistent catering services best practices	Identify a food request tool for CWS-wide use	Evaluate the tool & refine if data supports changes
	Document current office supply inventory & ordering practices	Standardize office supply inventory & ordering best practices	Evaluate & refine office supply inventory & ordering best practices
Provide exceptional customer & stakeholder experience		Co-create & define SLA including team expertise, service offerings, internal customers, expectations & capacity	Evaluate how the SLA meets customer needs
			Develop & document standard methods for decision resolution
	Define job description competencies		Begin a staffing gap analysis for resource needs & anticipated growth
	Monitor job descriptions & skill-level expectations		
Fulfill Board liaison duties	Train new staff		Analyze practice efficiency
		Review & update Board liaison practice & procedure documents	Establish regular review cycle for Board liaison practice & procedure documents
Absorb, embrace & echo CWS communications			Identify & develop communication networks & document communication roles, responsibilities & pathways

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Create consistent practices, processes & resources	# of procedure documents reviewed	100% annually	10	16	
	# of processes analyzed & updated	3	3	3	
	Cross training practices established	2	2	2	
Provide exceptional customer & stakeholder experience	Define & message team expertise & service offerings			Define	
	Develop a framework for positions then evaluate	1 annually	2	4	
	Hold meetings with programs to share the message	5		4	
	Requests within SLA	95%			90%



FY25-27

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, cyber liability, and property coverages. Focus areas include risk financing (commercial, self-insurance, captive insurance programs), enterprise risk management, claims management, contract insurance provisions, and loss prevention.

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
- *Dazzling* personalities

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
- 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

Abbreviations

CCE: Communications & Community Engagement

CD: Culture & Development

CWIC: Clean Water Insurance Company

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

DS: Digital Solutions department

FM Global: Factory Mutual Insurance Company

HR: Human Resources department

Marsh USA: CWS' broker of record for property and casualty insurance programs

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

WET: Water Engineering & Technology department




PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Administration	Administer Origami risk management information system, including providing data to inform decision-making & identifying threats & opportunities		
	Communicate effectiveness of claims & safety program with leadership using data dashboards		Communicate claim data and trends to CWS stakeholders via Origami dashboards
	Partner with CD, CCE, & HR to expand Origami training & incident reporting		
	Partner with Procurement & Legal on updating contract language & contract review & analysis		
	Partner with Procurement & Legal to develop internal contract requirement tool	Partner with CD & CCE to disseminate internal contract requirement tool across CWS departments	Partner with Procurement to create standardized insurance requirements based on contract type
	Partner with contract administrators to ensure appropriate contract requirements are addressed		Partner with department users to ensure appropriate contract requirements are recommended & addressed
	Partner with cybersecurity program to implement systems that reduce cyber insurance		Continue partnership with Cybersecurity to maintain current risk register in Origami
			Continue ongoing administrative education and one-on-one training with Origami consultant
Risk identification	Implement & monitor programs & policies to mitigate exposure		
	Enhance & monitor relationship between FM Global, Facilities & WET throughout design & build phases of construction		
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	Manage relationship with 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	Monitor & evaluate earthquake limits & layering options for optimal coverage

Objective	Initiatives		
	FY 25	FY 26	FY 27
Commercial insurance		Send staff to FM Global policy holder meeting & workshops	Send staff to FM Global policy holder meeting & workshops to better facilitate resiliency for construction and remodel projects
	Manage relationships with SDAO for liability, general & auto		Manage relationships with SDAO for liability, general, auto, crime and drone
	Evaluate SDAO with Marsh for risk & ensure that any gaps found are considered		Evaluate SDAO with current broker for risk products to insure identified exposures
	Conducted a feasibility study to reassess the WC program	Evaluate feasibility study to determine insurance options	Evaluate insurance options for workers' compensation
	Annual SAIF audit to include proper payroll & appropriate WC codes for all new hires		
	Manage relationship & policy with cyber insurance provider		Work with cybersecurity team to manage cyber best practices including contracts with cyber exposures to best protect CWS
	Leverage MARSH resources to conduct tabletop exercise	Conduct cyber penetration testing	
	Create digital risk register for cybersecurity in Origami Risk 	Advance current programs to negotiate lower premiums	
	Use SDAO loss prevention resources to enhance CWS programs		
	Captive insurance	Manage Fund 102, ensuring that CWS has adequate reserves for current & potential future claims	
			Facilitate re-domestication from Hawaii to Arizona
Manage captive insurance program, including developing policies, budgets & financial management. Manage vendor relationships, including legal, actuaries, banking, auditors & captive manager			Manage captive insurance program, including developing policies, budgets & financial management. Manage service provider relationships, including legal, actuary, banking, auditor, registered agent & captive management
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		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Claims management	Administrate WC, including acting as liaison between insurance company, management & employee		
	Administer property, liability, auto & subrogation program & coordinate with SDAO & FM Global		Administer property, liability, auto & subrogation program & coordinate with SDAO & CWIC
		Provide loss control trend data	Analyze loss trends and claim drivers, collaborate with stakeholders to translate insights into targeted controls, operational improvements & risk reduction strategies
			Partner with department leaders to conduct claim investigations, including documentation, release & payment for claim closure
Supporting loss prevention & employee safety	Liaison between & FM Global consulting services & TPS		Liaison between FM consulting services plant superintendents for plant inspections
	Provide training with superintendents to better understand property loss prevention		Work with superintendents to utilize FM resiliency credit
	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	Facilitate loss control services from insurance carriers (SDAO, FM, SAIF, with CWS teams)	
	Administer risk policies & procedures		
Succession planning	Professional development for all staff in program		Professional development to remain current with evolving legislation, case law, insurance trends, products & best practices

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Risk financing	WC experience modification factor	0.68	0.75 (2024 calendar year)	0.75	0.78
Claims management	General liability loss ratio (CWIC)		30%		
	Number of automobile physical damage claims	7	19	6	
	DART score				
	WC indemnity claim as a percentage of total WC claims	15%	15%	20%	20%
Managing emergencies	Accommodate 100% return to modified work releases	100%	100%	100%	100%
Supporting loss prevention	Ending fund balance in CWIC	\$10,000,000	\$6,600,000	\$8,200,000	



FY25-27

Safety Program

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. The group works with the CWS Emergency Management team to develop and maintain disaster preparedness and support CWS' operational response to emergencies. Group members serve as CWS' safety experts and partner with Human Resources, Risk Management, and CWS leadership 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 concerns 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 communications among teams and across work groups
- Leadership commitment to Safety program

Scope

- Promote safety with CWS employees and contractors

Value - Added

- Reduce accidents and injuries and 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
- Ensure that staff is equipped to work safely and productively, which can have a positive impact on CWS reputation as an employer of choice
- Empower employees to feel safe, supported, and engaged at work
- Promoting a culture of safety
- Meet or exceed safety regulations and compliance

Abbreviations

C&D: Culture & Development program

CIP: Capital Improvement Program

CWLO: Clean Water Learning Online

LSC: Local Safety Committee

OR-OSHA: Oregon Occupational Safety and Health Administration

RAD: Regulatory Affairs department

SDS: Safety Data Sheets

UOPS: Utility Operations & Services department



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
PROMOTE EMPLOYEE HEALTH, SAFETY & WELL-BEING			
Manage and monitor safety recognition program	<p>Conceptualize, develop & implement safety recognition program</p> <p>Solicit input from LSC leadership group</p> <p>Implement Safety Incentive Program across CWS</p>	<p>Standardize annual safety recognition program</p> <p>Utilize LSC leadership group for monitoring safety recognition program performance & appetite</p> <p>Implement & Manage Safety Incentive Program across CWS</p>	<p>Implement newly standardized annual safety recognition program; evaluate program effectiveness & budget</p> <p>Continue implementation of Safety Challenge Coin program; work with CCE on communications & iterative updates</p>
Develop, monitor, and improve LSC OSHA compliance	<p>Monitor, learn & adjust LSC platforms to ensure OR-OSHA compliance</p> <p>Partner with LSC Leadership group to standardize best practices across CWS</p>	<p>Create & schedule annual LSC audits focusing on OR-OSHA recordkeeping requirements. Partner with LSC Leadership group to monitor individual & global LSC performance</p>	<p>Schedule annual LSC audits, monitor recordkeeping performance</p> <p>Inform LSC leadership group of results & mitigations</p>
ADMINISTER SAFETY COMPLIANCE			
Provide SDS management	<p>Monitor & adjust performance of SDS Manager</p> <p>Develop SDS Manager training for all affected staff</p>		<p>Monitor & adjust performance of SDS Manager; build labeling templates within the system</p> <p>Deliver department-specific SDS manager training focusing on SDS awareness & container labeling</p>
Provide CWLO safety training	<p>Monitor, learn & adjust performance of CWLO training program</p>	<p>Partner with C&D to enhance delivery & recordkeeping of CWS training</p>	
Administer safety program auditing system	<p>Update Safety policies & procedures to ensure OR-OSHA compliance</p> <p>Develop systems to audit recordkeeping, training & field compliance</p>	<p>Create subcommittees for the Big 5 safety policies</p> <p>Implement systems to audit recordkeeping, training & field compliance</p>	<p>Create subcommittees for CWS Safety Manual</p> <p>Implement auditing systems based on CWS safety program compliance</p>

Objective	Initiatives		
	FY 25	FY 26	FY 27
DEVELOP WORLD-CLASS SAFETY CULTURE			
Manage and monitor CWS safety policies	<p>Review & update all CWS safety policies & procedures to meet OR-OSHA compliance</p> <p>Develop system to ensure annual updates of all CWS safety policies & procedures</p>	<p>Review and update all CWS safety policies & procedures to meet OR-OSHA compliance</p> <p>Implement system to ensure annual updates of all CWS safety policies & procedures</p>	<p>Review & update all CWS safety policies & CWS Safety Manual, including any affected procedures at department & division levels</p>
Manage comprehensive safety CIP	<p>Monitor, learn & adjust performance of Safety CIP</p>	<p>Provide equitable resources to all CWS programs</p>	

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Promote employee health, safety & well-being	Provide global solution for Safety Incentive Program	100%	Develop CWS Safety Incentive Program	Implement & monitor Safety Incentive Program	Monitor safety challenge coin program for iteration improvements
Administer safety program auditing system	# Safety Audits	52	22	52	52
	% of compliance found in safety audits (baseline needed)	90%	80%	90%	90%
	Meet schedule expectations	100%	100%	100%	100%
	Consolidate LSCs		Implement charters for UOPS & RAD LSCs	Standardize charters & LSC service delivery	Monitor LSC service delivery & compliance
	Safety Conference attendance & learning	4	2	3	4
	Meet schedule expectations	100%	100%	100%	100%
Administer safety compliance	Manage SDS				
	Meet schedule expectations	100%	100%	100%	100%
	Expand CWLO safety training				
	Meet schedule expectations	100%	100%	100%	100%
Develop world-class safety culture	Update CWS safety policies		Review & update all CWS safety policies in partnership with Risk	Create subcommittees for Big 5 Safety Policies	Monitor subcommittees for District Safety Manual review
	Meet schedule expectations	100%	100%	100%	100%
	Consolidate all CWS Safety CIP spending		Develop budget & seek approval for Safety CIP	Analyze budget	
	Meet schedule expectations	100%	100%	100%	100%
Recruit & retain employees	Hire designated positions		1		
	Onboard	100%	100%		



FY25-27

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

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

TPS: Treatment Plant Services

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 25	FY 26	FY 27
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	Expert level of training on CWS facilities	Continue to cross-train staff on all facilities even those 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		
Manage janitorial & landscape services		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		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 & burglary alarm system at FO	Replace security, access & burglary alarm system at Durham	Replace security, access & burglary alarm system at Hillsboro WRRF
Maintain, repair & renew critical occupied building infrastructure		Plan & lead roofing systems lifecycle replacements	

Objective	Initiatives		
	FY 25	FY 26	FY 27
IMPLEMENT CMMS FOR FACILITIES			
Facilities maintenance management	Utilize Lucy to monitor, learn & adjust maintenance procedures & schedules & identify required resources including corrective maintenance		

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Hire & onboard staff to perform mission-critical work	Onboard	100%	100%	100%	100%
Support office space planning	Office space planning milestones				Relocate ABC staff to Central and WQL staff to new Lab facility
	Meet schedule expectations	100%	100%	100%	100%
Manage janitorial services	Janitorial services contract milestones			<ul style="list-style-type: none"> • Manage Relay Resources contract • Hold contractor accountable to terms & conditions of agreement 	<ul style="list-style-type: none"> • Manage Relay Resources contract • Hold contractor accountable to terms & conditions of agreement
	Internal customer complaints	3<	3<	3<	3<
Maintain, repair & renew critical unoccupied building infrastructure	Meet schedule expectations	90%	90%	90%	90%
	Meet schedule expectations	90%	90%	90%	90%
Replace assets at end of useful life	End of useful life milestones			<ul style="list-style-type: none"> • Develop criteria & prioritize critical buildings • Execute projects to maintain critical building assets 	<ul style="list-style-type: none"> • Develop criteria & prioritize critical buildings • Execute projects to maintain critical building assets

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Facilities maintenance management	Lucity management milestones		Upload maintenance tasks into Lucity	Upload maintenance tasks into Lucity	Upload maintenance tasks into Lucity
	Meet schedule expectations	95%	95%	95%	95%
	Preventive & corrective maintenance work order milestones				<ul style="list-style-type: none"> • Update identified revisions to work order scope & frequency • Implement scheduling & tracking for non-treatment plant facilities work orders
	Meet schedule expectations	100%	100%	100%	100%



FY25-27

DS

Digital Solutions

Full-time equivalents: 29

Departmental operating budget: \$ 11,768,900

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
 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 25 Actuals	FY 26 Estimated	FY 27 Estimated
FTEs filled	100%	79%	90%	95%
Average service desk tickets received per month *number in FY26 only included ChangeGear tickets	500	925	348*	400
Devices deployed		Not reported	1632	1700
Data maintained		Not reported	164 TB	170 TB

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
End user satisfaction of service desk tickets	10	9.64 / 10 "Very Satisfied"	9.64 / 10 "Very Satisfied"	9.8 / 10 "Very Satisfied"
Employee engagement (Gallup)	4	3.6	3.49	3.5
Software budget growth	10%	\$3.1M / \$2.354M = 31.7% increase	\$3.5M / \$3.1M = 12.9% increase	\$3.9M / \$3.5M = 11.4% 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.	
	Remediate known vulnerabilities across systems	
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
Cultivate employee engagement & development	Identify & encourage learning & training opportunities for all DS employees.	
	Continue to assess positions & job descriptions to allow for growth opportunities & upward mobility.	
	Create professional development plans for all department staff	
DISASTER RECOVERY		
Customer service	Deploy customer service feedback survey for ticketing and for overall services provided by DS	
	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.	
Establish centralized GIS Program	Create a GIS program by centralizing employees with complimentary skill sets in geospatial systems and services to provide standard GIS services and support to all CWS departments and departments.	

Objective	Objective Statement	KSO
Build IT Client Services program	team of IT Technicians and Business Systems Analysts, providing greater customer service capabilities and improving front-line support for the technological needs of all CWS employees	
Update, upgrade and monitor systems	Perform system upgrades to maintain support and security of systems	
	Integrate observability and security platforms into existing systems for improved system monitoring, logging, and troubleshooting	
Coordinate project & program development with internal work groups	Establish and utilize committees for collaboration and communication of technology projects, planning, and governance, including the IT Steering Committee and GIS steering committee.	
Deliver GIS system services	Utilize customer service approach to develop GIS datasets & metadata to support data-driven decision-making	
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	
Provide regional coordination of system planning	Partner with internal stakeholders & co-implementer cities to ensure maintenance & accuracy of a regional GIS (utility import & asset transfer)	
Establish quality control processes	Create program and department SLAs for requests and incidents and being monitoring performance against those SLAs	



FY25-27

Information Technology Business Applications

The IT Business Applications program delivers application development and deployment, system maintenance, workflow automation, business intelligence, system integrations, and data services that enable efficient, secure, and modern operations across CWS. The program prioritizes initiatives that align with CWS' strategic objectives. The IT Applications team of software engineers, database administrators, data warehouse engineers, and data analysts provide technical expertise and partner with departments to deliver reliable, scalable, and innovative digital solutions.

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

Abbreviations

ADA: Americans with Disabilities Act
AI: artificial intelligence
BI: business intelligence
Board: CWS Board of Directors
CFR: change failure rate
CI/CD: continuous improvement/continuous delivery
CSAT: customer satisfaction score
EBS: E-Business Suite
IT: information technology
PDP: professional development plans
LOC: lines of code
MTTR: mean time to restore
SLA: Service Level Agreement
WIMS: Water Information Management Solution
XLIMS, 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 25	FY 26	FY 27
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	
	Data governance & management project, phase 1	Begin Data Management Master Plan Phase 2 – Initial Data Warehouse design and use cases	Data Management Master Plan Phase 2 – Initial Data Warehouse implementation and WIMS assessment
		Data governance & management project, phase 2	Begin Data Management Master Plan Phase 3
		Develop data governance policy	Establish data governance committees & objectives
Modernize & innovate		Upgrade Oracle EBS	Upgrade Oracle EBS to latest version
		Begin development of new Coimplementers web portal	Complete rollout of Coimplementers web portal
		Modernize & reduce technical debt	
		Develop application to support employee performance evaluation process	
	Identify LIMS integrations, pipelines & data classifications	XLIMS procurement process	Support XLIMS implementation
		Begin XLIMS implementation	Complete XLIMS implementation
		Public website migration kickoff	
		Public records request system	
			Implement tools for ADA Title II compliance
	Begin to develop water quality stations for stream & natural treatment system with data logger	Deploy stations & pilot for season	
Gather requirements for contract management system	Select & implement contract management system	Complete contract management implementation	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Modernize & innovate	Begin migration of initial SharePoint components	SharePoint online migration	
		Procure new service desk ticketing system	Complete implementation of new ticketing system
	Evaluate Oracle EBS migration to Linux	Plan EBS to Linux migration	Migrate EBS to Linux
		Migrate finance reports to SplashBI	
Cultivate employee engagement & development	Implement changes to facilitate opportunities for career development	Create additional job descriptions for junior & senior positions, to facilitate career entry & growth in IT Apps program	
	IT Applications employee skill development & training		
		Establish & monitor PDPs for each team member	Review & refine PDPs for each team member
Documentation	Begin to expand documentation & repositories	Continue to expand documentation & repositories	
Customer service		Deploy survey for customer service feedback	Improve on initial survey baselines
Enhance IT governance		Create approved software catalog	Add additional detail to approved software catalog
	Provide tools to end users for guidelines on programming languages, software & process		
Increase cybersecurity capabilities & system security	Remediate known vulnerabilities		

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 24	Estimate FY 25	Estimate FY 26
Modernize & innovate	Annual net change in supported applications	5%		Establish baseline	5%
Documentation	Percentage of applications documented in catalog	100%	0%	70%	100%
	Documentation & system architecture diagram completion	100%	Not tracked	10%	25%
Enhance IT governance & compliance	Percentage of policies reviewed annually	100%		100%	100%
Security & Risk	Vulnerability remediation time	100% critical patches within 48 hours		100%	100%
5 Customer Service	First contact resolution rate	70%		Unknown	70%
Build data management framework & systems to support data-driven decision-making	Data governance maturity level	3, based on DAMA or CMMI scale		Discover	2
	Change failure rate (CFR)	<10% of deployments require rollback or patch		0%	5%



FY25-27

Information Technology Infrastructure

The IT Infrastructure program is responsible for designing, deploying, and maintaining CWS' core technology environment, including networks, servers, storage, and cloud platforms. They ensure system reliability, performance, and availability through monitoring, patching, backup, and disaster recovery practices. The team also manages identity, access, and security controls to protect systems and data from threats and unauthorized use.

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

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 25	FY 26	FY 27
Increase cybersecurity capabilities & system security	Changes to SCADA network		
	Collaborate with SCADA team regarding ongoing network improvements		
Modernize & innovate	Cloud-smart prioritization		
	Modernize & reduce technical debt		
		Migrate internet connectivity	
		Implement & support infrastructure for GPU-intensive applications and processes	
		Plan new phone system project requirements	Finish new phone system implementation
Cultivate employee engagement & development	Assess gaps in current opportunities for career development	Implement changes to facilitate opportunities for career development	
	Modernize mobile devices & mobile apps	Desktop virtualization	
		Establish & monitor PDPs for each team member	Review & refine PDPs for each team member
		IT Infrastructure employee skill development & training	
Regular equipment replacement & renewal	Deploy new equipment, following scheduled refresh cycles		
Documentation		KB articles added, reviewed, tied to incidents	
			Establish CAB within Jira platform
			Begin tracking change success rate metrics
System availability & disaster recovery	Migrate data center to CoLo	Improve change management process & communication	
	Identify gaps in system backups	Implement new technologies to support additional backups	
		Test backup restore process for select systems	
		Develop formal disaster recovery plans	Annual review of disaster recovery plans
		Annual disaster recovery simulation & testing	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Enhance IT governance		Create & implement Digital Solutions budget planning process	Continue modifying & improving budget planning process
	Annual review of all IT Infrastructure-related policies		
	Internal review / audit of internal resource usage & lifecycle		
Customer Service		Deploy survey for customer service feedback	Improve on initial survey baselines

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
System availability & disaster recovery	Production backup coverage	Servers: 100% DBs: 100% O365: 100% Network shares: 100%	Servers: 100% DBs: 100% O365: 100% Network shares: 100%	Servers: 100% DBs: 100% O365: 100% Network shares: 100%	Servers: 100% DBs: 100% O365: 100% Network shares: 100%
	Successful test restores	Restores: 7 Success rate: 100%	Restores: 7 Success rate: 100%	Restores: 17 Success rate: 100%	Restores: 10 Success rate: 100%
	System uptime	99.99%	99.95%	99.95%	99.9%



FY25-27

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



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Customer service		Deploy survey for customer service feedback	Act on customer service feedback
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	Maintain and add 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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Customer service	Service Desk phone answer rate	95%	89.51%	89.70%	95%
	Time to close – critical priority	4hrs	2 days	2.08 days	1.5 days
	Time to close – high priority	1 day	3.89 days	3.04 days	3 days
	Time to close – medium priority	2 days	3.76 days	3.84 days	3.5 days
	Time to close – low priority	5 days	7.21 days	5.76 days	5.5 days
	IT Tech staffing ratio	70:1	160:1	160:1	160:1
Regular equipment replacement & renewal	End-user equipment deployed	180	170	150	125



FY25-27

Geographic Information Systems

The 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. GIS team members support process improvement, modeling, teamwork, and collaboration throughout CWS, partner agencies, and the community. They 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

GIS: geographic information system

KPI: key performance indicators

PDP: professional development plan



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Establish centralized GIS program	Establish centralized workflow for GIS work requests	Implement system for GIS Work requests	Review, track & report work requests & team performance KPIs
	Develop GIS Manager job description, recruit	Hire & onboard GIS Manager	
	Establish GIS governing committee	Develop GIS policies, procedures, processes, roles & responsibilities	Review, evaluate & refine GIS policies, procedures, roles & responsibilities
	Analyze current GIS tasks performed & determine which projects, tasks, processes & services will be responsibility of new GIS program	Formalize GIS team, fill vacant GIS positions; review division of responsibilities, adjust & refine as necessary	Identify gaps in service delivery, grow GIS team to address gaps if needed
		Plan & develop the GIS strategy – create a GIS strategic master plan	Implement, review & refine geospatial strategy
		Implement a central GIS hub for CWS to serve anyone looking to access GIS data & documents	Refine GIS hub & explore opportunities to expand accessibility
		Implement methods to increase customer engagement	Review & refine customer engagement methods
Provide regional coordination of system planning	Partner with internal stakeholders & co-implementer cities to ensure maintenance & accuracy of a regional GIS (utility import & asset transfer)		
	Develop a co-implementers asset transfer process based on new IGAs	Implement a co-implementors asset transfer process based on new IGAs	Expand co-implementors asset transfer process based on new IGAs to other jurisdictions
	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 25	FY 26	FY 27
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		Utilize customer service approach to develop GIS datasets & metadata to support data-driven decision-making	Identify opportunities to increase data discoverability & accessibility
	Develop digital cartographic maps, web maps, story maps, visualizations & applications for internal & external stakeholders		
Coordinate project & program development with internal work groups		Socialize centralized GIS model & channels for collaboration & communication	
Cultivate employee engagement & development		Establish & monitor PDPs for each team member & continue to support successful onboarding	Review & refine PDPs for each team member
	GIS employee skill development & training		
Update, upgrade & monitor systems	Integrate Datadog in ArcGIS for better performance monitoring & logging on external-based processes	Upgrade Enterprise Portal to 11.5; upgrade ArcGIS Pro to 3.5; migrate users to named user license model	Upgrade Enterprise Portal to 12.0; upgrade ArcGIS Pro to 3.6
	Implement technical debt process to refine GIS-based nightly routines		
	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	Implement & socialize the community resiliency mapping strategy	Review & refine community resiliency mapping strategy

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Deliver GIS system services	Number of GIS work requests completed	TBD	250	275	300
	Number of ArcGIS users per day (including desktop and web GIS users beginning in FY27)*	300	76	250	275
	Number of GIS integrations	1,450	1,418	1,450	1,450
Cultivate employee engagement & development	Percentage of staff that have documented & approved PDPs	100%	40%	60%	100%



FY25-27

FA

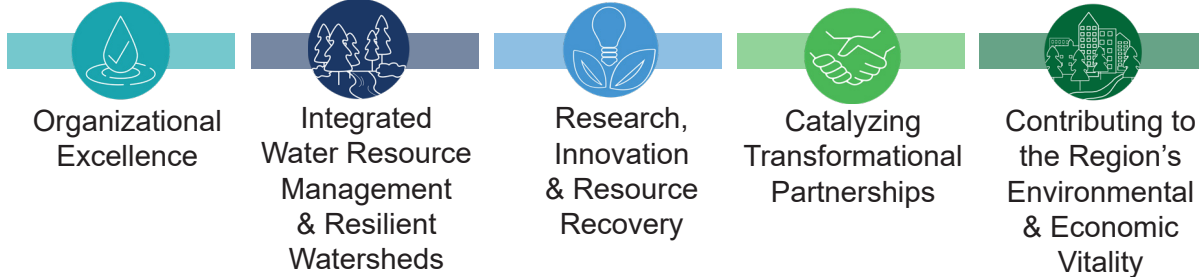
Finance & Accounting

Full-time employees: 21

Departmental operating budget: \$6,441,100

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 25 Actuals	FY 26 Estimated	FY 27 Estimated
Percentage of operating budget	4.0%	4.3%	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 25 Actuals	FY 26 Estimated	FY 27 Estimated
Revenue (percentage actual to budget)	100%	102%	95%	100%
O&M expenditures (percentage actual to budget)	90%	85%	85%	85%
Capital expenditures (percentage actual to budget)	90%	85%	90%	90%
Bond rating	AAA/Aa1	AAA/Aa1	AAA/Aa1	AAA/Aa1
Rates (comparison)	4% increase	\$65.00 (4% increase)	\$66.95 (3% increase)	\$71.23 (6.4% increase)
Total operating ratio	49.8	62.9	60.0	60.0
Total quick ratio	2.2	9.16	9.00	9.00
Debt coverage ratio	2.25	7.93	44	6.39
Days cash on hand	700-900	1,222	1,100	1,100
Asset condition	40.0	38.9	40.0	40.0
Sanitary sewer operating ratio	49.8	61.5	60.0	60.0
Sanitary sewer debt ratio	30.0	13.0	13.0	13.0
Surface water management operating ratio	49.8	73.5	73.0	73.0

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.	



FY25-27

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

Abbreviations

ACFR: Annual Comprehensive Financial Report
CCE: Communications & Community Engagement
CIP: Capital Improvement Program
CIS: customer information system
COSS: cost of services study
DS: Digital Solutions
EIS: Enterprise Integrated Solutions
ELT: Executive Leadership Team
EMMA: Electronic Municipal Market Access
FOG: fats, oils, and grease
FTE: full-time equivalent
GASB: Governmental Accounting Standards Board

GFOA: Government Finance Officers Association
GPA: Government Portfolio Advisors
HR: Human Resources
OSF: Open Smart Flex
RFP: request for proposals
SAGE: Strategic Advisory Group to the Executive
SDC: System Development Charge
SDEPM: Strategy Development & Enterprise Performance Management
TVWD: Tualatin Valley Water District
W-2: Wage and Tax Statement



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Develop & maintain CWS financial policies & procedures	Develop new policies & procedures from prioritization list		
	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 CWS payroll services	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		
		Partner with HR & Legal on labor negotiations & implementation of labor agreement in Oracle/payroll	
Provide accounts receivable services	Monitor daily cash receipt & posting to Oracle process		
	Monitor monthly industrial & other billing processes (e.g., septic, FOG)		
	Develop billing & collection training for project managers		
	Monitor monthly billing process with the City of Portland		
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		
Provide annual budget & CIP services	Manage & monitor annual budget & CIP development process		
	Partner with HR & ELT 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		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Provide annual budget & CIP services	Improve forecasting, reporting & scenario planning & 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		
		Implement GASB Statement No. 102 – Certain Risks Disclosures	Implement GASB Statement No. 103 – Financial Reporting Model Improvements
			Implement GASB Statement No. 104 – Disclosure of Certain Capital Assets
	Evaluate key metrics & statistical trending in ACFR statistical section		
	Implement modifications to enterprise year-end closing process with SAGE sponsorship & enforceable deadlines		
	Implement modifications to capital asset management process including increase	Implement modifications to capital asset management process including classification, useful life, ownership & capital closeout	
	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		
	Perform RFP for financial audit services & award contract		
	Establish CWS Audit Committee & appoint members		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Provide financial reporting services	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		
	Develop cash flow planning process	Maintain cash flow planning process	
	Monitor E-payment system banking interface		
	Create enterprise internal control documents for treasury & investing		
	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 EIS reporting capability		
	Partner with CCE & Development Services on OSF Phase II – monthly billing, billing interface & AMANDA integration		
	Implement billing regional & local rates separately		
	Test & deploy Open SmartFlex Releases 47, 48, 49 & 50	Test & deploy Open SmartFlex Releases 52-54	Test & deploy Open SmartFlex Releases 51-55
		Partner with DS for SharePoint migration to another tool	
		Partner with DS on data warehouse for Open utility billing & Amanda customer reports	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Provide financial systems management services		Partner with DS on conversion from Oracle EIS to Splash BI reporting	Perform utility billing feasibility study
Provide debt management services		Report & file via EMMA, including post ACFR & disclosing 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 revenue bonds to fund new infrastructure & refunding of Build America Bonds	
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	
		Draft new intergovernmental agreement with TVWD for utility billing services	
		Contract with consultant to perform cost allocation study for utility billing services with TVWD	
		Issue informal request for utility billing feasibility study & select consultant	Complete utility billing feasibility study recommendations & determine future billings state
Provide strategic financial planning		Update & Maintain COSS financial forecast	
		Use COSS to formulate new utility billing rates	Implement new utility billing rates
		Partner with Capital Planning on developing SDC methodology	

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Provide financial reporting services	Number of financial audit findings	0	1	0	0
	Coverage ratio	2.25	7.93	7.44	6.39
	Bond rating	AAA/Aa1	AAA/Aa1	AAA/Aa1	AAA/Aa1
	Rates (comparison)	(increase 4%)	\$65.00 (increase 4%)	\$66.95 (increase 3%)	\$71.23 (increase 6.4%)
	Total operating ratio	49.8	62.9	60.0	60.0
	Total quick ratio	2.2	9.16	9.0	9.0
	Days cash on hand	700-900	1,222	1,100	1,100
	Asset condition	40.0	38.9	40.0	40.0
	Sanitary sewer operating ratio	49.8	61.5	60.0	60.0
	Sanitary sewer debt ratio	30	13	13	13
	Surface water management operating ratio	49.8	73.5	73.0	73.0



FY25-27

HR

Human Resources

Full-time equivalents: 10

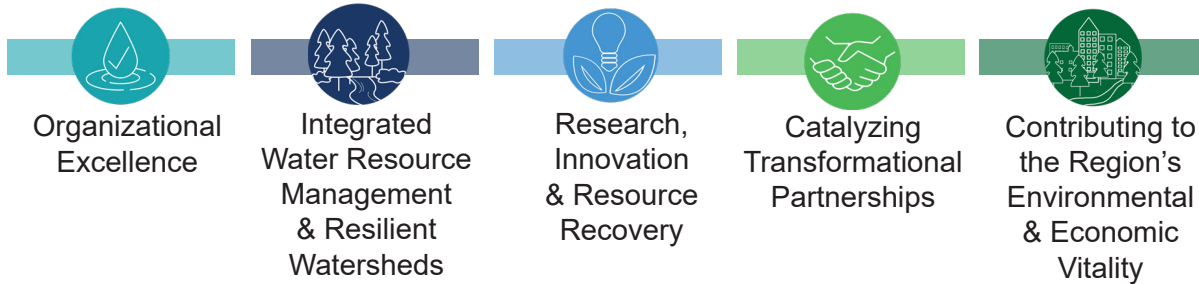
Departmental operating budget: \$2,933,400

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 25 Actuals	FY 26 Estimated	FY 27 Estimated
# of policies reviewed and updated	8	8	8	10
# of Supervisors meetings hosted	3	3	3	3
# of supervisor training sessions hosted	10	6	10	10

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Average time to fill vacant positions (days)	90	90	90	90
# of employee performance reviews completed	410	400	430	450
# of employee midyear check-ins completed	410	400	430	450

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	



FY25-27

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

Abbreviations

BIPOC: Black, Indigenous, and people of color
CCE: Communications & Community Engagement
CEL: Culture, Equity & Learning (now Culture & Development)
CWIC: Clean Water Insurance Company
EAC: Employee Advisory Council
ERG: employee resource group
HR: Human Resources
LMG: Labor Management Group
LOA: leave of absence
PEBB: Public Employees' Benefit Board
RFP: request for proposals
SME: subject matter expert



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
HR COMPLIANCE & ANALYTICS			
Oversee & implement HR compliance requirement & process changes	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 ELT & Board approval & within state & federal laws		
	Collaborate with Risk & Insurance Management, Legal, Finance & Accounting & CWIC board on state & federal compliance		
	Monitor & implement HR dashboard. Research current technologies for automation	Create items to include in dashboard automation for recruitment	Develop & test automated dashboard 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 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	Participate in Represented benefits audit with external auditor		Conduct a nonrepresented employee benefit survey
Implement new benefit provider & broker	Implement new nonrepresented benefits	Implement new benefit vendor for represented Flexible Spending Account	
	Prepare & submit RFP		
Manage HR benefit Oracle training	Create, test & implement new benefit provider options	Audit & review benefit entries on Oracle entry procedures & processes	

Objective	Initiatives		
	FY 25	FY 26	FY 27
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 & 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	Research & develop a wellness strategy, present findings to SAGE, present benchmark data		
	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	Research, review & update nonrepresented pay philosophy & policies		
	Initiate a pay equity study for nonrepresented employees	Conduct 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 25	FY 26	FY 27
Manage retirement program & implementation	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 NeoGov offboarding process & procedures & hiring manager SME review	Implement NeoGov offboarding process & procedures & hiring manager SME review
	Implement NeoGov interview self-scheduling & update disposition codes		
	Research NeoGov options for internal job posting site & dashboard opportunities		
Implement apprenticeship programs	Continue & evaluate apprenticeship program	Partner & review opportunities for expanding apprenticeship program	
Retention strategies		Review recognition program for retention improvements	Develop & propose 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	Expand & deliver supervisor training offerings	Monitor, update & deliver supervisor training offerings	
EAC	Provide continued support for ERGs & EAC		
Implement bilingual pay program	Administer & maintain bilingual pay program		

Objective	Initiatives		
	FY 25	FY 26	FY 27
EMPLOYEE PERFORMANCE MANAGEMENT & LABOR RELATIONS			
Manage employee relations	Manage employee & supervisor relations, resolutions & development of training-based outcomes		
Implement new performance management system	Conduct midyear evaluation process		
	Continue partnering with supervisors to develop & update job-specific competencies	Continue partnering with supervisors to develop & update job specific-competencies for new or updated positions	
	Annual review of CWS organizational & behavioral competencies		
	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		Review process & implement ratified labor agreement
Initiative to foster communication with HR & union	Host quarterly LMG meetings to increase communication		

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Talent Management	Number of employees supported	460	488	490	500
	Number of vacancies	48	48	30	50
	Number of active recruitments	24	24	15	20
	Authorized positions filled	80	80	60	65
	Separations	48	48	49	50
Organizational development & learning	Workforce diversity (% of BIPOC employees)	25	20	22	22
	Workforce diversity (% of female & nonbinary employees)	35	34	36	36



FY25-27

HR

Legal & Compliance Services

Full-time equivalents: 20

Departmental operating budget: \$4,845,400

The in-house legal team protects CWS' legal interest by advising on regulatory and business matters related to all aspects of legal compliance. The legal team also serves as CWS' legal representative. Compliance safeguards CWS from legal, financial, human resources, safety, environmental, regulatory, government ethics, and reputational risk associated with noncompliance. The department oversees Regulatory Affairs, Risk & Safety Management, Procurement, Cybersecurity, and Safety, including executive management.

Members of Legal Services draft a variety of documents including employment documents, training materials, contracts, easements, ordinances, intergovernmental agreements, policies and procedures, legal memos, and correspondence; and answer questions about purchasing rules, contracts, real property, environmental and municipal law, construction disputes, permits, labor and employment, and other legal matters. The General Counsel & Chief Compliance Officer retains and manages outside legal counsel on complex issues when needed.

Key Strategic Outcomes (KSO):








PE Strength & Opportunities












Goal Sharing measure

Department Service Levels	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Number of public records requests requested & completed	160	160	160	200
Number of contract tickets reviewed (Number does not reflect reviews not placed directly in the legal review queue)	380	380	400	550
Number of procurement policies and procedures developed or updated	8	4	20	20
Number of compliance audit projects completed	5	N/A	3	3
Rate of manual cyber-alert remediations	10%	75%	40%	30%
Cybersecurity training completion rate	98%	90%	95%	95%

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Average time to remediate cyber alerts (hours)	6	16	8	4
Cybersecurity training completion rate	98%	90%	95%	95%

Objective	Objective Statement	KSO
Ensure internal compliance	Ensure CWS consistently adheres to all applicable laws, regulations, policies, and procedures	
	Foster a culture of accountability by ensuring all CWS staff understand their compliance responsibilities and are equipped to uphold them.	
	Determine need and priorities for new policies and procedures.	
	Develop and approve new policies and procedures.	
	Audit CWS programs to determine compliance with policies, procedures and the law.	

Objectives	Initiative Statements	KSO
Increase capabilities & maturity of cybersecurity program	Enhance the security and resilience of CWS' technological environments by deploying cybersecurity tools and controls that enable continuous monitoring, asset visibility, and threat response.	
	Promote cybersecurity awareness across CWS by delivering annual training to all employees and conducting quarterly phishing simulations.	
REGULATORY AFFAIRS		
	Advise regarding long-term regulatory compliance strategy to meet current requirements and position CWS for the future.	
	Provide legal advice and guidance regarding the NPDES permit renewal process to achieve compliance and meet varied and complex needs.	
LEGAL SERVICES		
Ensure regulatory compliance	Continue to improve departments' comprehension of relevant laws & regulations, recognizing the critical role they play in governing CWS operations. Through ongoing education & training initiatives, we aim to deepen CWS' understanding of these legal frameworks, ensuring compliance & mitigating risks effectively. By integrating this knowledge into our day-to-day operations, we strive to uphold the highest standards of regulatory compliance & ethical conduct, fostering a culture of accountability & excellence within the organization.	
Provide timely service	In our commitment to delivering timely legal services, we are implementing measures to establish & monitor turnaround times for the services we provide. By setting clear expectations & targets, we aim to streamline our processes & enhance efficiency in delivering legal support. Through diligent monitoring & regular assessments, we will ensure that our services are rendered promptly & effectively, meeting the needs & expectations of our customers. This proactive approach underscores our dedication to providing exceptional legal assistance while prioritizing responsiveness & customer satisfaction.	

Objectives	Initiative Statements	KSO
Protect CWS interests	In safeguarding the interests of CWS, we emphasize the importance of conducting thorough reviews of contracts & agreements to ensure comprehensive protection. A comprehensive review of contractual terms & conditions, identifying potential risks & opportunities for negotiation. By prioritizing the alignment of agreements with the objectives & priorities of CWS, we mitigate potential liabilities & optimize favorable outcomes. Through our commitment to diligent review processes, we uphold the integrity & sustainability of CWS operations, fostering trust & confidence among stakeholders.	
Efficient and effective procurement process	Review and update procurement rules and procedures to enhance the efficiency and effectiveness of procurement. Success on this initiative includes factors such as purchasing the product or service in the desired quantities, with desired qualities, and at the desired price.	
Optimize procurement practices	Empower staff members to proficiently execute competitive purchasing and contracting processes, ensuring optimal value in the selection of goods, services, and construction. This initiative aims to establish and uphold purchasing policies, ensure compliance with regulations, and foster transparency and efficiency in procurement operations.	



FY25-27

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

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 25	FY 26	FY 27
Public records response & training	Evaluate & improve public record request process	Records management policy & implementation	
	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	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		
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 25	FY 26	FY 27
Legal assistance to HR		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; 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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Public records request response & training	Improve public records request response time (business days)	2	2	2	
Public records request response & training	Number of public records requests requested & completed	160	127	160	
Provide contract review services	Number of tickets reviewed	380	245	380	



FY25-27

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 efficiency in areas where controls are lacking.
 - 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.
 - Manage the policy and procedure development process.
- 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 have the policy and procedural guidance they need to do their jobs properly.
- 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.
- Guidance that takes the guesswork out of performing work and enables faster responses
- 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.

Abbreviations

CIS: Center for Internet Security

EDR: endpoint detection and response

IT: Information Technology

NCSR: National Cybersecurity Review

NIST: National Institute of Standards and Technology

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 25	FY 26	FY 27
Internal compliance: increase capabilities & maturity		Develop and prioritize list of audit projects	Conduct internal compliance audits
	Begin developing compliance policies and procedures development and approval protocols and templates.	Complete development of compliance policies and procedures and approval protocols and template	Refine compliance policies and procedures development and approval protocols and templates to reflect operating experience
		Manage the development and approval process for selected policies and procedures	
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 internal/external penetration test	
	Assess IT & OT cybersecurity (by third party)	Assessment remediation	
		Audit internal CIS security controls - IT	NIST SP 800-53 security controls audit
Roll out network detection – OT at each WRRF			
Cybersecurity: Modernize & innovate	Deploy privileged access system		Access management assessment
		Zero trust architecture – internal assessment	
Cybersecurity: System availability & disaster recovery		Backup Procedure Audit - IT	High-availability assessment
	Assess data loss prevention system		Deploy data loss prevention system – Phase 1

Objective	Initiatives		
	FY 25	FY 26	FY 27
Cybersecurity: Enhance IT governance		Document standard security process for software: current/ future	
	Create cybersecurity risk register		Adopt cybersecurity risk register

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
INTERNAL COMPLIANCE					
Create a comprehensive set of policies and procedures for CWS	Number of policies and procedures developed and approved		0	25	
Increase compliance audit productivity	Number of compliance audit projects completed			1	
CYBERSECURITY					
Automation	Rate of manual cyber-alert remediations	10%	40%		
Increase capabilities & maturity of cybersecurity	Cybersecurity training completion rate	98%	95%		
	Test phishing click rate	4%	8%		
Enhance IT governance	Percentage of information security policies reviewed & updated	100%	75%		



FY25-27

RUSD

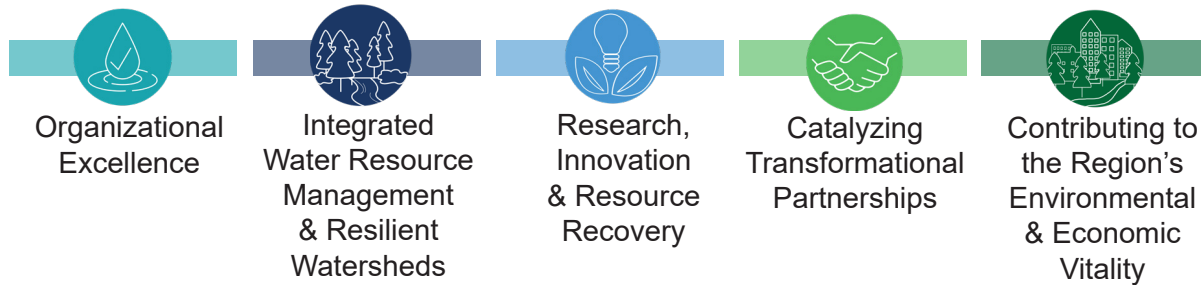
Regional Utility Services

Full-time equivalents: 43

Departmental operating budget: \$11,161,900

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, preschool through high school 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
- 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 25 Actuals	FY 26 Estimated	FY 27 Estimated
Additional acres of stormwater managed	90	95	100	100
Regional CIP projects receiving regional funding	8	10	10	5
Regional SDC project reimbursements to cities	\$6,036,000	\$7,637,000	\$6,036,000	
Regional environmental site certification & assessment reviews	170	170	170	170
CWS Essentials annual training participants	50	18	50	
CWS Civic Academy participants (FY27 start)	25			15
City connection permit authorization reviews	200	169	200	180

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Percent of city connection permit authorizations within time frames	90%	46%	50%	60%
Percent of regional environmental site certification & assessment reviews completed within time frames	90%	93%	95%	95%
NPDES permit compliance measures tracked	95%	95%	95%	95%
CWS Relationship Framework developed & adapted	100%	50%	100%	100%
Percent of stakeholders who biannually say CWS is successful in its commitment to the community & Tualatin River health	90%	82%	N/A	
Plan and implement CWAC community representative recruitment, assess applicants and recommend best-qualified candidates to Chief of Staff for consideration and final recommendation to Board	100%	100%	100%	100%

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 and its revisions 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 civic audiences on key projects, programs & the permit including CPOs, CWAC, business & development community, co-implementers, & environmental advocacy groups.	
Foster organizational understanding of customer and stakeholder values, 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 Relationship Framework, and Strategic Communications Guide & Community Engagement Guide.	

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 community engagement strategy, Relationship Framework & participation on the internal coordination team	



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, plan review, permitting, and inspection of new development, sanitary and stormwater management infrastructure; erosion control; vegetated corridor protection and 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 program that includes inventory, education/outreach, inspection, and enforcement.

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, coordination of local programs with the permit, 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

Abbreviations

1200-C/CN: Construction Stormwater General Permits
ARPA: American Recovery Plan Act
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
F&A: Finance & Accounting department
FIL: fee-in-lieu
GIS: geographic information system
IGA: intergovernmental agreement
LDR: limited development review
LID: Local Improvement Districts
LIDA: Low Impact Development Approaches
MOA: memorandum of agreement
MS4: Municipal Separate Storm Sewer System
NPDES: National Pollutant Discharge Elimination System
O&M: Operations and Maintenance
PSMF: Private Stormwater Management Facility
PTP: payment to provide
RD: Reimbursement Districts
RAD: Regulatory Affairs department
RSMC: Regional Stormwater Management Charge
SDCs: System Development Charges
SPL: service provider letter
SWMP: Stormwater Management Plan
THPRD: Tualatin Hills Park & Recreation Department
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 25	FY 26	FY 27
ENSURE COMPLIANCE WITH THE WATERSHED PERMIT, PERFORMANCE STANDARDS, SWMP, IGAS & D&C			
Cultivate culture Provide transparent, efficient, effective local planning, plan review, permitting, inspection & record management services	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 & watershed permit requirements		
	Manage records for all development-related documents, including as-builts, reports, easements & other real property documents		
	Collect & track RSMC & FIL for stormwater management		
		Update RSMC & FIL methodology based on metrics & regulatory framework	
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	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		
	Analyze policy topics & engage leadership group in preparation for D&C update	Develop strategy & begin to implement D&C stormwater revision	Implement strategy & begin to implement D&C stormwater revision
	Manage 1200-C/CN erosion control program as agent to DEQ & issue permit coverage according to existing MOA		
	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 technical review & issuance; coordinate with county & cities on implementation & inspections		
	Manage VCEF, PTP & advanced mitigation tracking	Manage VCEF, PTP & advanced mitigation tracking. Update tracking system	
	Update & implement product review & approval process	Update product review & approval process	Implement product review & approval process
	Participate in updating & implementing 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	
	Manage the stormwater retrofit program; track & implement with internal & external partners		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	Monitor & respond to changes in development types, regulatory requirements & legislative actions. Provide input during rule-making processes & update standards & procedures as necessary		
	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			
	Work with partners to integrate subbasin planning & sanitary & stormwater infrastructure into long-range community planning efforts, including UGB expansion & concept plans		
	Coordinate with internal work groups to ensure infrastructure readiness for development activity		
	Manage & facilitate CIPP committee with co-implementer cities. Track & support partner projects & distribute regional SDC funding		
	Coordinate with partners to incorporate CWS infrastructure needs & natural systems opportunities into partner projects (ex. county, city, school districts, THPRD, developer).		
	Manage utility coordination process, evaluate potential utility conflicts & engage affected work groups to facilitate a timely & complete response	Manage utility coordination & capital project review process with WashCo	
	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 group policy, procedure & reference documents		Update & maintain group policy, procedure & reference documents & organize group SharePoint & Teams sites
	Support & educate the development community on how to successfully & efficiently secure project approvals & permits		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Optimize program delivery, customer service & consistency	Update & maintain AMANDA database to maintain usability, improve workflows & respond to data needs	Expand public education information about stormwater management & LIDA; include visuals & aesthetic considerations	
		Update & maintain AMANDA & Lucity databases to maintain usability, improve workflows & respond to data needs. Launch Inspector App to improve data-collection efficiency	
	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	Support WRRD with management of Waste Disposal Pass.
	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 & 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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Provide transparent, efficient, effective local plan review, permitting, inspection & record mapping services	Additional acres of stormwater managed through development	90	95	100	100
	Site development permits issued (unincorporated area & small cities)	45	38	45	45
	Connection permits issued (unincorporated area & small cities)	550	447	650	600
	Erosion control inspections	8,000	8,552	8,000	8,000
	Percent of private stormwater management facility inventory inspected	50%	27%	35%	40%
	Site development plan reviews	150	141	150	150
	Limited development reviews	650	621	650	650
	Percent of site development reviews completed within time frames	90%	55%	65%	70%
	Percent of LDRs within time frames	90%	95%	95%	95%
	Percent of PSMF in need of nonroutine maintenance	<10%	6%	10%	8%
Provide regional coordination of system planning, D&C implementation, regulatory compliance & record management	City connection permit authorization reviews	200	169	200	180
	Environmental site certification & assessment reviews	170	170	170	170
	# of stormwater retrofit projects completed	4	2		2
	NPDES permit compliance measures tracked	95	95	95	95
	# of Erosion Control & PSMF program overviews conducted & reports sent	36	36	36	36
	# local technical advisory groups CWS participates in	8	10	6	2
	# regional & state advisory groups CWS participates in	5	10	6	2
	Percent of environmental site certification & assessment reviews completed within time frames	90%	93%	95%	95%
	Percent of city connection permit authorizations within time frames	90%	46%	50%	60%
	% co-implementers with stormwater outfall retrofit projects that meet MS4 pollutant reduction criteria	75%	22%	33%	33%

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Manage planning & development activities to meet infrastructure expansion & resiliency needs. Enhance project coordination & communication internally & with local & regional partners.	# city CIP projects receiving regional funding	8	10	10	5
	Total regional SDC project reimbursement to cities	\$6,036,000	\$7,637,000	\$6,036,000	\$10,842,500
	# of executed county & city partnership projects with a CWS cost-share IGA	5	3	9	13
	# of executed developer projects with development agreement for CWS cost-share	3	3	3	3
	# subbasin or watershed plans either led or supported by CWS	3	3	3	3
Optimize program delivery, customer service & consistency	# of workflows available to customers through the online Permit Portal	12	8	10	10
	% of development-related customer payments completed using the online Permit Portal	95%	36%	50%	75%
Objective 5: Support structured learning, foster career growth, retain talented staff & improve communication to achieve a resilient organization delivering high-value services	# of interdisciplinary peer-to-peer trainings made available to team	10	10	14	12



FY25-27

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, which support regional public service priorities and compliance with the utility's National Pollutant Discharge Elimination System permit. CCE builds mutually beneficial relationships, earns trust, enhances credibility, and increases widespread support for CWS' essential role in protecting water resources, responsibly stewarding ratepayer investments, and nurturing a thriving region for people, businesses, and the built and natural environments.

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.

By guiding and applying shared organizational standards for transparency, clarity, accessibility, education, and participation, CCE ensures that every interaction with the community builds understanding and trust, strengthens CWS' credibility, and protects the organization's ability to meet regulatory and environmental commitments. This unified approach fosters informed and inclusive participation, supports sustained community behavior change, and enables CWS to fulfill its mission with accountability to the people and ecosystems it serves.

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 information and 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 building value for ratepayers' investments, accessible information and services, and alignment with community values

Scope

- CWS workforce, partners, and stakeholder groups

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 information loop between the community, the CWS Board of Directors, the Clean Water Services Advisory Commission, 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

C&D: Culture & Development

COS: chief of staff

CRM: customer relationship management

CURO: chief utility relations officer

CWAC: Clean Water Services Advisory Commission

D&C: Design and Construction

DOJ: Department of Justice

DS: Digital Solutions departments

ELT: executive leadership team

FOT: Friends of Trees

FY: fiscal year

GS: Goal Share, Goal Sharing

HSP: Healthy Streams Plan

KSO: Key Strategic Outcome

LGE: Let's Get Engaged training

NSES: Natural Systems Enhancement & Stewardship department

PMSP: Portland Metro STEM Partnership

RUSD: Regional Utility Services department

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

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 25	FY 26	FY 27
Integrate CWS policies, programs, initiatives with the values, needs & expectations of the community	Conduct situational assessment of current organizational engagement approaches, gaps, needs & barriers within underrepresented communities	Phase II: Evaluate initial data & workshop feedback & develop a comprehensive organizational strategy for engagement planning with underrepresented communities. Deliver to ELT.	
	Continue strategic community engagement within underrepresented communities in partnership with Centro Cultural de Washington County, based on results of assessment & in alignment with CWS Community Resilience Mapping project.		
			Evaluate CWS-wide CRM (constituent/customer) & software needs with DS, the COS & CURO. Scope as part of website update &/or part of the utility billing system update.
	Create & implement a standard feedback survey across all departments to assess satisfaction, responsiveness & service quality & inform customer-experience successes & improvements to maintain transparency & trust.		Continue to implement & update a standard feedback survey across all departments to assess satisfaction, responsiveness & service quality & inform customer-experience successes & improvements to maintain transparency & trust.
	Maintain consistent participation in PMSP to develop prioritized community relationships that foster & leverage education opportunities.		
	Manage & leverage adult & student stormwater education with Tualatin Basin Partners for Clean Water & in alignment with Relationship Framework, Education Strategy & CWS' collective impact initiatives.		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Integrate CWS policies, programs, initiatives with the values, needs & expectations of the community	Implement recommendations of 2023 Residential Customer Awareness & Satisfaction Survey to increase awareness & understanding & build trust & credibility for CWS, its partners & their work	Conduct 2025 biannual Residential Customer Awareness & Satisfaction Survey; present results to staff, CWAC, Board & identified stakeholders. Prioritize & implement recommendations	Conduct 2027 Residential Customer Awareness & Satisfaction Survey; present results to staff, CWAC, Board & identified stakeholders. Prioritize & implement recommendations
	Conduct Stakeholder Insight Survey for mutually beneficial business relationships. Deliver presentations to staff, CWAC, Board, & identified stakeholders. Prioritize recommendations	Implement recommendations after presentation to Board & ELT. Plan for 2026 Stakeholder Insight Survey	Conduct 2026 Stakeholder Insight Survey; present results to staff, Board & identified stakeholders. Prioritize recommendations.
	Implement recommendations from equitable procurement research with C&D, NSES & Procurement.		Co-develop & execute developer applicant research with RUSD & integrate results of Stakeholder Insight Survey. Prioritize recommendations
	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 focus group recommendations into FY26 Residential Customer Awareness & Satisfaction Survey to track performance meeting community values	Implement recommendations from focus group feedback.
Empower a climate-ready community that is connected to nature & cares for our built & natural environment	Advise & incorporate community values into Fernhill North Plan	Advise & incorporate community values into Fernhill wayfinding	On hold due to limited staff capacity/position vacancy
	Co-create & deliver intentional programming with internal & external partners based on Fernhill Visitor Experience Plan priority list		On hold due to limited staff capacity/position vacancy
	Evaluate & adapt Student Education Strategy		Update the Education Strategy to include adult education & events strategy
	Coordinate & adaptively manage the facility tour program. Collaborate with WRRD to provide tours		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Empower a climate-ready community that is connected to nature & cares for our built & natural environment	Implement community event strategy & promote throughout CWS		Implement & evaluate the community event strategy while adjusting the approach as needed to reflect capacity constraints
	Assess & adaptively manage community science program with partners, including outreach plan for prioritized audiences		
	Co-develop, manage & promote the Tualatin River Watershed Navigator Program with community partners & identified staff		Assess & adaptively manage the Watershed Navigator program with community partners & identified staff
	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	Develop & execute annual public awareness & behavior change campaign aligned with recent survey work recommendations, permit & SWMP	
		Implement community engagement & strategic communications outreach plan for the Climate Action & Long-Term Regulatory Compliance strategic roadmaps	
	Support engagement plan with collective impact partners that align with CWS goals	Co-develop communications & engagement plan with collective impact partners, aligned with CWS goals	Implement communications & engagement plan with collective impact partners, aligned with CWS goals
Promote meaningful access to information & participation opportunities for all individuals & communities.	Work with Gov't Affairs & DS teams to audit digital communication platforms to determine gaps & opportunities to meet DOJ's ADA Title II compliance. Determine language accessibility requirements & needs	Develop enterprise user accessibility strategy & implementation plan to meet language & DOJ ADA Title II compliance standards by April 20, 2027, in partnership with Gov't Affairs, Digital Solutions & compliance staff	Implement enterprise user accessibility strategy & implementation plan to meet language & DOJ ADA Title II compliance standards by April 20, 2027, in partnership with Gov't Affairs, Digital Solutions & compliance staff
	Continue to add DOJ ADA Title II compliant tags to photos per prioritization & procure assets in Canto/digital asset database		








Objective	Initiatives		
	FY 25	FY 26	FY 27
Promote meaningful access to information & participation opportunities for all individuals & communities.	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 & in alignment with messaging framework 	Continue to update Grammar & Usage Guide to include translation & ADA Title II compliance guidelines & in alignment with messaging 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, prioritize & implement strategy for 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	
	Implement Student Education Strategy focused on Title I school engagement		Implement Student Education Strategy focused on schools with lowest science benchmark scores
	Implement Fernhill Visitor Experience Plan		On hold due to limited staff capacity/position vacancy
Build awareness & credibility for CWS positive impact on region's environmental & economic vitality while delivering value for ratepayers	Update & communicate Strategic Communications Plan & Brand Plan aligned with the Messaging Framework, updated community values & recommendations from the Stakeholder Insight Survey	Finalize & integrate the Strategic Communications Guide & Stakeholder Engagement Guide. Present to Senior Leaders group & integrate into LGE training	Continue integrating principles of Strategic Communications Guide & Stakeholder Engagement Guide across all CWS communication & engagements
	Continue integrating principles of Strategic Communications Guide & Stakeholder Engagement Guide across all CWS communication & engagements		Implement utility relations communications & outreach plan with CURO & RUSD aligned with the Relationship Framework
	Survey past participants to gather feedback & inform future programming. Implement recommendations	Support CWS Essentials onboarding program for city representatives with CURO	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Build awareness & credibility for CWS positive impact on region's environmental & economic vitality while delivering value for ratepayers	Manage new employee website project. Determine advisory group & host engagements to determine needs, gaps	Continue to implement employee website project for launch by December 2026 in alignment with SharePoint Online migration	Continue to implement employee website project for launch by December 2026.
	Lead engagement & communications strategy for key CWS initiatives including permit update & WBMP to build trust & credibility with the community	Lead engagement & communications strategy for key CWS initiatives including permit update & WBMP, HSP 2.0 & D&C Standards to build trust & credibility with the community. Align with engagement audit & Strategic Communications 7 Engagement Plan	Lead engagement strategy for key CWS initiatives including permit update, HSP 2.0 & D&C Standards to build trust & credibility with the community. Align with engagement audit & Strategic Communications 7 Engagement Plan
Sustain an expert & informed team	Develop prioritization plan to regularly connect with internal staff to lead enterprise community engagement, communications & brand management strategies aligned with organizational guiding documents, community social research, permit, SWMP & Climate Action & Long-Term Regulatory Compliance strategic roadmaps	Implement plan for regularly connecting with internal staff to inform organizational governance & strategy for community engagement & messaging aligned with community social research, permit, Strategic Communications Guide, Engagement Strategy, Stakeholder Engagement Guide, SWMP & Climate Action & Long-Term Regulatory Compliance strategic roadmaps	Continue to prioritize, update & implement internal connection plan for strategic communications & engagement
	Co-charter organizational Relationship Management Framework for strategic organizational relationships to meet CWS KSOs 	Co-charter organizational Relationship Framework for strategic organizational relationships to meet CWS KSOs 	Implement & adapt organizational Relationship Framework

Objective	Initiatives		
	FY 25	FY 26	FY 27
Sustain an expert & informed team	Develop naming & filing conventions, transfer CCE Work Request to Asana. Create workflow SOP. Pilot Asana project management system	Continue to develop & implement operational framework for CCE project management, workflows, tracking & reporting	Continue to pilot & create SOP for CCE project management & operations. Create training for current & new employees
	Develop & execute LGE internal training. Create SOP for organizational community engagement strategy	Develop a recorded LGE training in Absorb. Continue to create collaborative community engagement planning	Create & implement Absorb training rollout to internal work groups. Continue to promote collaborative community engagement aligned with organizational strategy
	Inspire an engaged team by developing & executing yearly Gallup action plans		
	Update Fernhill Visitor Experience Plan based on new opportunities		
	Regularly update organizational communications, engagement & creative services guides, including CWS Brand Plan, Strategic Communications Plan, Stakeholder Engagement Guide & Identity & Style Guide (including Grammar & Usage Guide)	Develop administrative policies for , the production & delivery of all CWS communications & creative assets to enforce ADA Title II requirements	Continue to work with ELT to promote & implement CWS-wide content & graphics policies to enforce ADA Title II requirements & build trust & credibility through accessible engagement
	Get ELT approval of policy, procedures. Develop program	Redraft two policies (Trespass & Houseless) & procedures docs, bring to ELT for review & approval.	Work with DS to create repository of resources on SharePoint, Develop comms plan to share internally
			Implement Houseless Program including development of rollout plan
		Develop & implement Minor Safety Policy & annual CWS staff training	Implement Minor Safety Policy & annual CWS staff training

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Integrate CWS policies, programs & initiatives with the values, needs & expectations of the community	Average % increase for residents who say CWS actions match their values “Describes CWS well” (survey)	10%	N/A	10%	
	% of residents who say they feel connected to the Tualatin River & its streams (survey)	70%	N/A	64%	
	% of residents who say CWS informs & educates how to reduce pollution (survey)	50%	N/A	31%	
	# of PMSP events attended	15	15	10* reduced based on limited capacity	10
	# of community partners that participate in the Tualatin Basin Public Awareness Committee	8	7	7	7
Empower a climate-ready community that is connected to nature & cares for its built & natural environments	# of activities resulting from connections made through PMSP	20	28	20	20
	# of engagements (clicks, shares, likes, comments) outlined in behavior change campaign	63,000	N/A	63,000	
	# of million impressions outlined in behavior change media campaign	6	N/A	6	6
	# of Fernhill Visitor Station visitors due to promotion & outreach	1,000	900	300 *reduced based on capacity	300
	# of Fernhill volunteer hours completed	150	89	N/A program on hold	N/A
	# of schools that participate in at least two educational activities per year	25	26	25	25
	# of community events attended per prioritization plan	10	11	5 *reduced due to capacity	5
	# of tours in public facilities	40	49	30 *program on hold	40
	# of student field & classroom presentations	160	142	80 *reduced due to capacity	80

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Empower a climate-ready community that is connected to nature & cares for its built & natural environments	# of unique users to Watershed Navigator website	6,500	3,975	4,000	4,000
	% of identified equity-mapped zip codes that have at least one community science event (using equity map tool)	50%	N/A	30%	30%
	# of culturally relevant opportunities for diverse & underserved communities at Fernhill 	5	3	2*reduced due to capacity	2
	# of schools engaged that have less than 25% of students meeting science benchmarks	20	28	20	20
	# of education programs delivered with identified culturally specific organizations	15	8	10	10
Provide meaningful access to information & participation opportunities for all individuals & communities	CWS-wide user accessibility strategy & implementation plan to meet language & DOJ ADA Title II compliance (GS) 	100%	N/A	50%	100%
	% of new CWS print & digital communications & graphics that are ADA Title II compliant 	100%	100%	100%	100%
	Culturally specific participatory opportunities strategy developed & implemented	100%	50%	100%	100%
Build awareness & credibility for CWS positive impact on region's environmental & economic vitality while delivering value for ratepayers	% annual average Community Connection open rate	50%	43%	50%	50%
	% annual average Clean Water Connection open rate	50%	~47%	50%	50%
	# of Newsroom visitors	6,000	5,900	6,000	6,000
	Updated Brand & Narrative Plan developed & implemented 	100%	N/A	80%	100%
	% of residents who say that Clean Water Services is doing an excellent, good & fair job (survey)	80%	N/A	75%	N/A
Sustain an expert & informed team	Train 100% of CWS identified staff on Let's Get Engaged 	80%	0%	80%	80%
	Gallup score for "I know what's expected of me"	4.0	3.91	4.0	4.0



FY25-27

RAD

Regulatory Affairs

Full-time equivalents: 43

Departmental operating budget: \$ 11,363,700

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: industrial stormwater discharge general permit
ACWA: Association of Clean Water Agencies
DCS: Design and Construction Standards
DEQ: Department of Environmental Quality
DM: Durham Water Resource Recovery Facility
ES: Environmental Services
FOG: fats, oils, and grease
FTE: full-time equivalent
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
RPA: reasonable potential analysis
SSO: sanitary sewer overflow
SWMP: Stormwater Management Plan
TRWC: Tualatin River Watershed Council
USGS: U.S. Geological Survey















PE Strength & Opportunities













Goal Sharing measure

Department Service Levels	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
COMPLIANCE SERVICES				
Submit watershed-based NPDES permit renewal application and complete renewal process with DEQ	0 (no permit renewal)	0	0	1
Submit Air Contaminant Discharge permit renewal application and complete renewal process with DEQ	3 (DM, PS x2)	1	1	1
Create next permit strategy, regulatory compliance integrated plan with DEQ & long-term compliance strategy & implement with the departments	1	1	1	1
Manage flow release for augmentation & trading (in acre-feet)	14,272	10,136	11,000	11,000
Submit routine NPDES & regulatory reports including ad-hoc reports	76	76	76	76
Coordinate internally & with co-implementers to update DCS, SWMP, IGAs, Healthy Streams Plan 2.0, Performance Standards with adaptive management approaches for stormwater	1 (2025-2027)	1	1	1
Support update of city & county IGAs	1	2	1	9
ENVIRONMENTAL SERVICES				
Industrial permits with current permit requirements & completed routine inspections	75	65	75	65
Source control investigation to water resource recovery facility operations (PFAS investigation, nitrates at DM, MAHL exceedance investigations, RPA special projects)	20	19	20	20
Industrial facilities with PFAS management plans	65	19	65	65
Industrial stormwater 1200-Z inspected	20	16	20	20
LABORATORY SERVICES				
Analytical results	308,000	291,933	320,000	352,000
Compliance determinations	63,000	60,902	65,000	55,000
Special projects (R&I, ES investigations)	60	62	58	50
Designated, permit monitoring & sampling locations	92	99	99	99

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
COMPLIANCE SERVICES				
Annual reports completed on time	100%	100%	100%	100%
Compliance reports completed on time, including SSOs, permit excursions, illicit discharges & response to regulatory agency inquiries	100%	100%	100%	100%
Flow augmentation targets met	95%	95%	95%	95%
Million kcals generated by flow augmentation	2,500	2,489	2,500	2,500
ENVIRONMENTAL SERVICES				
Water quality & illicit discharge investigations 50 average annual (100% follow-up)	100%	100%	100%	100%
Treatment facility disruptions (follow-up)	0	0	0	0
Incident of ongoing noncompliance (12 months)	0	0	0	0
Industrial users receiving compliance recognition (% of industries)	70%	50%	50%	50%
LABORATORY SERVICES				
Passing third-party performance testing analysis	100%	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%	95%	98%	98%

Objectives	Initiative Statements	KSO
COMPLIANCE SERVICES		
Implement the permit, including near- & long-term compliance strategies	Continue the use of innovative permit compliance strategies by implementing the integrated plan memorandum with DEQ. Implement strategy to prepare for the next permit. Implement the long-term compliance strategy 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 DCS, SWMP & Performance Standards.	
City / county IGAs	Complete Washington County IGA. 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.	
	Support 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 compliance reports in a timely manner	Coordinate, prepare, & review annual reports related to monitoring, effluent discharges, and events. Define recommended actions for continual improvements.	
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	Increase capacity on PFAS methodology through additional staff training.	
	Collaborate with R&I to validate the 6PPD-q method	



FY25-27

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. The program also provides research priorities to Research & Innovation on watershed and river studies that help identify ways to optimize water quality, regulatory compliance, and watershed health.

Goal

- Provide timely, efficient, and effective compliance service that meets the needs of stakeholders while also protecting public and environmental health
- 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

Abbreviations

ACWA: Association of Clean Water Agencies
CORMIX: a water quality modeling and decision support system
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 25	FY 26	FY 27
COMPLIANCE SUPPORT			
Implementing & complying with regulatory permit	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 DS to automate air discharge annual reports 	Work with DS to refine & implement automated air discharge & reuse annual reports. Develop document storage procedures & platform. GS deferred to FY27	Work with DS to refine & implement automated air discharge & water quality trading annual reports. Develop document storage procedures & platform 
	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. Completed. 	Ongoing maintenance of tools to track report development, document management & report notification process
	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. Completed 	Work with DS to design & implement the permit compliance tracking dashboards
	Work with WRRD to develop air quality compliance program management structure	Work with WRRD to develop air quality compliance program management & document structure	Develop air quality compliance program management & document structure

Objective	Initiatives		
	FY 25	FY 26	FY 27
Improved reporting & compliance process management	<p>Work with NSES to develop a strategy to optimize riparian planting program for thermal compliance & climate change resiliency</p> 	<p>Work with other CWS departments to develop thermal compliance strategy to optimize WQT program & climate change resiliency</p>	<p>Work with other CWS departments to develop thermal compliance strategy</p>
	<p>Work with R&I to refine & update model, develop tool for managing flow</p>		
	<p>Work with the Lab to review & evaluate current watershed monitoring sites</p> 	<p>Comprehensive review & evaluation of watershed monitoring sites, contracts, priorities, funding, ownership, safety & access</p>	<p>Consolidate information & develop water quality portal for watershed monitoring sites</p>
PREPARATION FOR FUTURE PERMIT			
Prepare for future permit issues & anticipated limit	<p>Develop permit conditions & expectations for next permit & prepare for permit renewal application</p> 	<p>Develop permit conditions & expectations for next permit & prepare for permit renewal application (GS for 2027)</p>	<p>Develop permit conditions & tech memos for next permit, conducting outreach & compiling & submitting permit renewal application (GS for 2027)</p>
	<p>Work with R&I & NSES to conduct drone & eDNA surveys to gather data at outfalls for mixing zone fish passage evaluation</p>	<p>Continue to work with R&I & NSES to conduct drone & eDNA surveys to gather data at outfalls for mixing zone fish passage evaluation</p>	<p>Conduct CORMIX modeling at outfalls for mixing zone fish passage evaluation</p>
	<p>Complete field work</p>	<p>Upon receipt of analytical results, work with CWS departments to develop necessary reports</p>	<p>Upon receipt of analytical results, work with CWS departments to develop necessary permit required reports</p>
	<p>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</p>	<p>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</p>	
	<p>Partner with R&I to develop copper treatment strategy for FG compliance, evaluate treatment impacts to thermal load & temperature increases</p>		<p>Partner with R&I to monitor copper at FG</p>

Objective	Initiatives		
	FY 25	FY 26	FY 27
Prepare for future permit issues & anticipated limit	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	Partner with R&I & ES 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	Partner with R&I & ES to understand PFAS coming to & leaving WRRFs, in stormwater, source & fate of PFAS & land application of reuse & biosolids. Develop plan for future regulations
	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	Support NSES on watershed resilience & enhancement work including Healthy Streams Plan 2.0, thermal compliance strategy, climate change, emerald ash borer & trading program update
	Develop PFAS compliance report 	Move to ES	Managed by ES & R&I

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	Implement long-term regulatory compliance strategic roadmap
	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	Work with R&I to implement MAO with DEQ to study meeting the competing phosphorus & aluminum regulations
	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		Work with R&I to package information on Thomas Dairy for DEQ to use in update of reuse IMD for guidance in pilot project implementation, finalization of the updated reuse IMD, policies that support additional beneficial uses & pilot projects

Objective	Initiatives		
	FY 25	FY 26	FY 27
Influence external regulatory structure	Identify & implement program updates pending final 303(d) list		
	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	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	
	Create implementation & supporting regulatory structure for updated SWMP 	Implement process for updating SWMP with internal departments & the co-implementers	Implement process for adaptively managing the stormwater program including updates to the DCS, SWMP, IGAs & Performance Standards with internal departments & the co-implementers
	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	Interface with ES to evaluate the need for source control investigations including operational incident response & tracking & reporting for potential exceedances of WQS
		Develop monitoring & permitting approach for Stormwater Monitoring Plan that provides data to answer implementation questions	

Objective	Initiatives		
	FY 25	FY 26	FY 27
PERSONNEL DEVELOPMENT			
Staff development		Update PDPs & meet with management to facilitate goals	
	Identify leadership roles in professional organizations		Participate in professional organizations
	Present at professional conferences & trainings & internal Passport events		Participate in professional conferences, trainings, CWAC & Board meetings & other internal & external events

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Implement & comply with regulatory permits	Ad-hoc compliance (SSO reports) submitted on time	100%	100%	100%	100%
	NPDES permit renewed & issued	N/A	N/A	N/A	1
	Air quality permit renewed & issued	1	N/A	1	1
Specific permit compliance requirements	Percent of annual reports, compliance reports submitted on time	100%	TBD	100%	100%
Improved reporting & compliance process management	Percent of plans, manuals & guidance documents updated within required permit frequency	100%	TBD	100%	100%
	Percentage of annual reports & compliance reports automated or review process streamlined (5 for FY 25/26)	100%	TBD	100%	100%
Influence external regulatory structure	Percentage of time we're able to submit comment letters (public input, correspondence) on relevant issues	100%	50%	50%	50%
Mature stormwater program	WQ & IDDE investigations	100%	TBD	100%	100%



FY25-27

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; fats, oils, and grease (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

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
ERP: Enforcement Response Plan
ES: Environmental Services
FO: Field Operations
FOG: fats, oils, and grease
IDDE: illicit discharge detection and elimination
IGA: intergovernmental agreement

KPI: key performance indicators
MS4: Municipal Separate Storm Sewer System
NEC: No Exposure Certification
NO: nitrate or nitrite
NO3: nitrate
NOV: Notice of Violation
O&M: operations and maintenance
OIR: Operational Incident Response
P2: pollution prevention
PDP: professional development plan
PFAS: Per- and Polyfluoroalkyl Substances
R&I: Research & Innovation
RUSD: Regional Utility Services department
SMR: Self-Monitoring Report
SWMP: Stormwater Management Plan
VFA: volatile fatty acids
WRRD: Water Resource Recovery Operations & Services department
WQF: water quality facility
WRRF: water resource recovery facility
YDO: Your DEQ Online



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Proactively administer BMPs for the MS4 permit			Proactively administer BMPs for the MS4 permit
		Improve response to illicit discharges & spills to the MS4; develop decision matrix & train internal staff	Complete development of decision matrix & implementation with internal staff
			Implement Commercial Stormwater Program, develop BMP checklists, distribute technical support materials
OIR program development		Deploy incident response training to R&I, FO, O&M & CCE	Streamline responses with WWRD, R&I, CCE & other applicable CWS stakeholders
Achieve pretreatment effectiveness		Review & evaluate data collected for new local limits	Initiate & complete comprehensive local limits evaluation
		Develop & implement automated SMR Template & Hazardous Waste Notification fact sheet for Industrial Users.	Continue to streamline internal data entry processes & implement updated guidance & outreach materials for industrial users.
		Evaluation of pretreatment software alternatives that allow for electronic submittals of required reports from industrial users to meet the regulatory needs of the program	
	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		Implement PT audit recommendations for the following IGAs: “City of Lake Oswego and City of Tualatin” & “City of Portland”

Objective	Initiatives		
	FY 25	FY 26	FY 27
Resilient staffing & sustainable resources	Implement annual ES self-assessment of employee engagement		Work with staff on possible career pathways & growth, refinement of safety training requirements & opportunities
			Develop pollution control & management plan review checklists to streamline the internal review & approval process
	Implement annual ES update of PDPs		
	Develop guidance materials & SOPs documenting historic knowledge & internal process procedures.		
P2 implementation	Implement outreach program for industrial, commercial & domestic sources of PFAS (GS)		
	Collect & contribute to the analysis of industrial, commercial & domestic PFAS samples from sanitary sources		Define the discrete roles of R&I, WQL & ES in the sampling, analysis & evaluation of PFAS sources
		Evaluate the effectiveness of PFAS Management Plans through ongoing data analysis & review of PFAS temporal stability analysis conducted by R&I	
Support troubleshooting of influent characteristics at water resource recovery facilities	Coordinate with R&I to develop continuous monitoring of the conveyance system		Evaluate effects of industry pilot project on increased VFAs at the Durham WRRF
Develop adaptive management for 1200-Z administration		Continue to use KPI dashboard to evaluate annual risk assessment & determine inspection schedule	
			Renewing all 1200-Z permits
			Utilize YDO as a 1200-Z management tool
		Streamline NEC reissuance process	


Objective	Initiatives		
	FY 25	FY 26	FY 27
FOG program implementation	Conduct cross-training to implement a proactive FOG program		
	Conduct cross training with industrial FOG ES case managers		
	Continue implementing FOG triage for facility compliance		
	Evaluate & purchase updated FOG software		Work with stakeholders on utilizing updated FOG BMP software
	Utilizing pretreatment ERP to capture FOG noncompliance		Utilizing NOV for FOG noncompliance
Achieve Hauled Waste program effectiveness	Update Hauled Waste permit template		
	Identify acceptance procedures & approach to hauled industrial waste (FY26 & FY27)		
Improve effectiveness of industrial surveying process			Streamline & triage intake of internal/external survey process 

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Proactively administer BMPs for the MS4 permit	Improve internal controls & processes for effective response & tracking	100%	100%	100%	100%
Deploy OIR	Implement internal & external coordination for effective treatment plant process investigation	90%	100%	50%	90%
Achieve pretreatment effectiveness	Evaluation of Local Limits, updated internal guidance & effective IGA implementation	100%	100%	50%	100%
Resilient staffing & sustainable resources	Develop SOPs documenting historic knowledge & the development of team PDPs & safety training requirements			50%	90%

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
P2 implementation	Effective pollution prevention strategies to understand & respond to PFAS loadings from commercial, industrial & residential sources			100%	100%
Support troubleshooting of influent characterization at water resource recovery facilities	Coordinate with R&I on surveying conveyance system & evaluate effects of industry pilot project on increased VFAs at the Durham WRRF			50%	50%
Develop adaptive management for 1200-Z administration	Conduct 1200-Z renewals & utilize KPI dashboard			100%	100%
FOG program implementation	Utilize FOG software			90%	100%
Achieve Hauled Waste program effectiveness	Update hauled waste permit template & establish an effective system for the acceptance of hauled nondomestic waste			100%	100%
Industrial surveying process	Develop an effective industrial survey process			100%	100%



FY25-27

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 lab work 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

Abbreviations

6PPD: N-(1,3-dimethylbutyl)-N'-phenyl-p-phenylenediamine: organic chemical used as stabilizing additive in rubber
CS: Compliance Services
EPA: Environmental Protection Agency
ES: Environmental Services
FG: Forest Grove
FO: Field Operations
FTE: full-time equivalent
GS: Goal Share, Goal Sharing
LSC: Local Safety Committee
MS4: municipal separate storm sewer systems
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
WRRD: Water Resource Recovery Operations & Services department





PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
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 Initiate planning for WQL lab move to FG: Identify relocation team & assign responsibilities, build timeline	Develop and implement action plan for lab move to FG, continuity of operations
	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 	Cross training to provide back up for NTS and WRRD specialists
	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	Collaborate & cross-train to improve & optimize business continuity	Review & update procedures & document in new SOPs	Increase depth through cross training
	Contract vendor for training staff on field sampling methods & instrumentation	Implement new technologies to optimize sampling	Conduct hands-on refresher training sessions with ES & FO
Formalize workplace procedures including safety	Implement SOP recommendations	Annual review & update of current SOPs	Review & update ambient site safety documents
	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	Update procedures for lone worker safety
	Conduct multiple workshops & trainings to understand & optimize workflow between internal customers & Lab	Review procedures for incidence response & work with CWS partners on improvements	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Formalize workplace procedures including safety	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	Increase depth through training for Industrial pretreatment and MS4 sampling
Conduct special projects & method development	Implement PFAS monitoring & increasing PFAS training	Conduct PFAS monitoring	6PPD analytical training and validation
	Craft input for EPA pending development of virus disinfection & water quality criteria		

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Perform compliance sampling & analysis in a timely manner	Meet expectations & schedule for Gallup action plan	80%		85%	
	Number of compliance determinations per FTE	3,200	3,866	3,900	3,900
	Meeting scheduled permit requirements	100%	100%	99.997%	100%
	Meeting scheduled internal request requirements	100%	100%	100%	100%
	Treatment plant sampling completed	100%	100%	100%	100%
	Required industrial sampling	100%	100%	100%	100%
Provide ambient water quality monitoring & sampling	Number of staff cross-trained to support ambient water quality monitoring & sampling (increasing analytical range of staff)	4	4	3	3
	Number of ambient analytical results per FTE	3,190	2,969	3,000	3,000
	Number of compliance determinations per FTE	300	490	400	400
Formalize workplace procedures including safety	SOPs reviewed	100%	100%	100%	100%
	Third-party performance testing analysis	100%	96%	100%	100%
Conduct special projects & method development	Number of staff cross-trained on research methods	2	1	2	1
	Average number of special projects per project manager	6	8	6	6



FY25-27

WET

Water Engineering & Technology

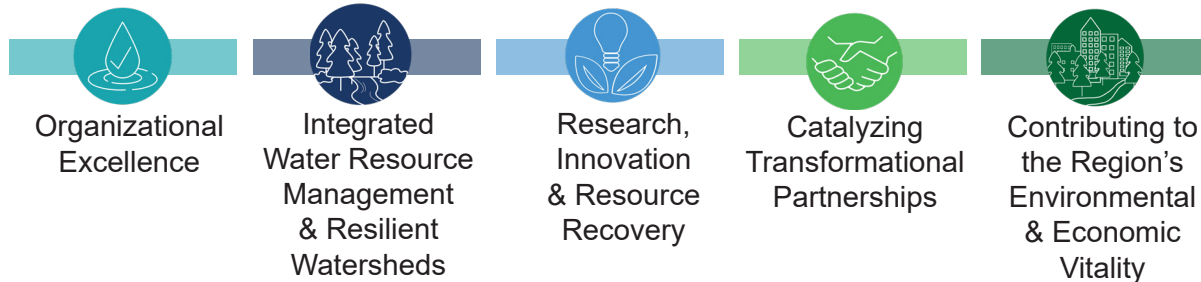
Full-time equivalents: 72

Departmental operating budget: \$14,752,700

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

1. Capital project planning: Staff members develop facility plans, master plans, and other planning documents that guide conveyance, treatment, and facility improvements. These planning efforts ensure projects are cost-effective, strategically aligned to meet regulatory compliance requirements, service area growth, and infrastructure asset management objectives. Planning activities also incorporate integrated initiatives that span multiple departments and external stakeholders.
2. Capital project delivery: Staff members provide pre-design, design, construction contract document development, easement acquisition, environmental permitting, construction contract project delivery, and construction contract administration, construction project startup, and commissioning services for conveyance, pump station, water resource recovery facilities, and occupied facilities. These functions are supported in the Conveyance Engineering, Treatment Plant Services, and Construction Support Services programs.
3. Research and innovation: Staff members develop strategic modeling, analytical tools, and technical evaluations to inform regulatory compliance strategies and long-term system performance. They support operations by improving the reliability and effectiveness of treatment processes and by evaluating and implementing technologies that enhance watershed protection, address emerging regulatory requirements, and reduce lifecycle costs.

Key Strategic Outcomes (KSO):



Abbreviations

- AI: artificial intelligence
- CIP: Capital Improvement Program
- EBMP: East Basin Master Plan
- 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 25 Actuals	FY 26 Estimated	FY 27 Estimated
Sanitary & storm rehabilitation projects CIP	\$7,500,000	\$7,202,213	\$13,674,000	\$15,507,800
Pump station projects CIP	\$32,000,000	\$3,839,231	\$8,755,000	\$11,431,000
Durham WRRF projects CIP	\$14,500,000	\$9,420,067	\$11,876,000	\$25,250,000
Rock Creek WRRF projects CIP	\$16,600,000	\$17,602,717	\$14,492,000	\$21,530,000
Forest Grove WRRF projects CIP	\$10,850,000	\$19,927,356	\$30,650,000	\$2,030,000
Hillsboro WRRF projects CIP	\$1,100,000	\$3,105,666	\$546,000	\$900,000

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Rehab sani & storm projects \$100K or larger	10	16	13	22
Treatment & pump station fund 112 projects \$100K or larger	34	40	37	51
Percentage of conveyance & treatment project actual to planned capital expenditure	90%	80%	108%	85%

Objectives	Initiative Statements	KSO
Manage East Basin & West Basin CIP	Administer, plan, design, and manage construction of CWS' Capital Improvement Program (CIP) for the East Basin (tributary to the Durham facility) and West Basin (tributary to the Forest Grove, Hillsboro, and Rock Creek facilities). Maintain and continuously update facility plans as living planning frameworks —iterative, data-driven processes that evolve with system performance, regulatory requirements, and adjust to growth.	
Utilize a science-based approach to address compliance Issues	Advance projects from planning-level evaluations to pre-design development with a focused emphasis on regulatory compliance by anticipating future regulatory horizons and applying current, validated process and system performance data to define scope, performance criteria, and implementation strategies.	
Construct projects to deliver design intent & provide best value	Establish a clear progression from project planning —focused on system needs, alternatives analysis, regulatory horizons, and program prioritization—to pre-design-level development , where current, validated data, regulatory and refined technical analyses are used to confirm project scope, performance criteria, and delivery approach. Plan and deliver projects using an integrated, cross-disciplinary approach that leverages collective expertise and system knowledge to optimize project outcomes and long-term asset performance.	
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	Utilize system modeling and trigger plots for capital planning	
	Continue to standardize budgeting and project prioritization	
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 staff during design of capital projects to optimize process efficiency and minimize construction changes.	



FY25-27

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

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

CST: capillary suction time

CUOO: chief utility operations officer

DBP: disinfection byproducts

DCM: digital control module

ddPCR: droplet digital polymerase chain reaction

DEQ: Department of Environmental Quality

DM: Durham

DNA: deoxyribonucleic acid

DS: Digital Solutions

EAB: emerald ash borer
 eDNA: environmental DNA
 EPA: Environmental Protection Agency
 ES: Environmental Services
 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
 MAO: Memorandum of Agreement
 mg/L: milligram per liter
 ML: machine learning
 MP: microplastic
 MS4: municipal separate storm sewer system
 MSDS: material safety data sheet
 MST: microbial source tracking
 NO2: nitrite
 NO3: nitrate
 NPDES: National Pollutant Discharge Elimination System
 NSES: Natural Systems Enhancement & Stewardship
 NTS: Natural Treatment System
 O2: oxygen
 ODA: Oregon Department of Agriculture
 ODF: Oregon Department of Forestry
 Ops: Operations
 P: phosphorus
 PEPS: primary effluent pumping station
 PFAS: per- and polyfluoroalkyl substances
 PHA: polyhydroxyalkanoate

QC: quality control
 RAD: Regulatory Affairs department
 RAS:
 RC: Rock Creek
 R&I: Research and Innovation
 RNA: ribonucleic acid
 RT-ddPCR: Reverse transcription droplet digital polymerase chain reaction
 SIU: significant industrial user
 SOP: standard operating procedure
 SPC: surrogate (or sample) processing control
 SW: stormwater
 TBD: to be determined
 TMDL: total maximum daily loads
 TOP: total oxidizable precursor
 TP: total phosphorus
 TPS: Treatment Plant Services
 TR: Tualatin River
 TRWC: Tualatin River Watershed Council
 TSCWD: Tualatin Soil and Water Conservation District
 TSS: total suspended solids
 USGS: U.S. Geological Survey
 W2:
 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
 W2 & RAS models of NTS &



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
CAPITAL IMPROVEMENT PLAN SUPPORT			
Develop & deploy a capital planning tools	Develop capital planning tool for West Basin as part of WBMP	Develop & deploy tools to support yearly evaluations for East & West Basin treatment capital planning efforts	
Industrial coordination	Monitor industrial flow & load projections & ongoing contributions		
	Respond to discharge request evaluations		
	Assist ES with industrial discharge troubleshooting & laboratory testing as needed.		
inDENSE pilot	Install pilot system on Basins 6&7	Install pilot system on Basins 6&7, evaluate success of the inDENSE pilot	Design permanent inDENSE system if results warrant it
Provide design & start-up guidance for capital improvement projects	Annual debrief of projects		
	Routine TPS coordination meeting		
	Update CIP prioritization		
	Execute process evaluations related to the FG primary clarifier		
OPERATIONS SUPPORT			
WRRD instrumentation program management	Develop & manage implementation plan for current & future advanced instrumentation		
	Collaborate with multiple stakeholders to ensure staffing is adequate to support instrumentation		
	Create & deploy data quality management systems		
Provide process guidance & optimization	Collaborate with process analysts to troubleshoot process issues & optimize systems		

Objective	Initiatives		
	FY 25	FY 26	FY 27
NTS evaluation & regulatory compliance	Develop & refine enhanced sampling & monitoring program to characterize TSS within NTS. Evaluate data to improve TSS. Document findings for RAD & Operations.	Continue enhanced monitoring to characterize TSS within NTS. Evaluate additional data to improve TSS mitigation strategy & assist RAD as needed to acquire relevant data. Coordinate with RAD for next NPDES permit cycle regarding NTS TSS compliance.	Continue enhanced monitoring for TSS fate & characterization. Coordinate with RAD for next NPDES permit cycle regarding NTS TSS compliance.
	Evaluate turbidity, temperature, conductivity, water level & chlorophyll data to assess trends & assist regulatory compliance strategy	Maintain & refine continuous monitoring at selected NTS internal locations to inform operations & inform regulatory compliance strategy	Maintain & refine continuous monitoring at selected NTS internal locations
	Refined monitoring & response strategies	Continue to refine response framework for permit compliance.	Continue to refine response framework.
	Collaborate with Operations & WQL on e-rounds implementation & refinement	Collaborate on e-rounds implementation & refinement	
	Updated NTS Operations Plan	Update NTS Operations Plan	
	Coordinated with RAD on permit renewal	Coordinate with RAD on permit renewal	
	Coordinated on NTS upgrades discussion & design; coordinated on NTS repairs		Coordinate on NTS upgrades discussion & design
Data management master planning	Deliver first phase of planning effort	Deliver second phase of planning effort, budget third phase of planning effort	Deliver third phase of planning effort, budget fourth phase of planning effort
Support troubleshooting of influent NO ₂ /NO ₃ loadings at treatment facilities	Work with WRRD Operations & ES to identify possible sources of influent NO ₂ /NO ₃	Work with WRRD Operations & ES to identify possible sources of influent oxygen & NO ₂ /NO ₃	
	Work with Operations to develop strategies to mitigate detrimental impacts of influent NO ₂ /NO ₃	Work with Operations to develop strategies to mitigate detrimental impacts of influent oxygen & NO ₂ /NO ₃	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Coordinate filter operation across RC & DM	Execute full scale study at RC, full-scale study at DM	Execute full & pilot scale study at RC, full-scale study at DM	Execute full & pilot scale study at RC
	Evaluate filters through sampling, troubleshoot solutions & implement modifications to impacted filters		
Flow EQ	Acquire & install PEPS power monitoring. PEPS programming & trials. Project closeout & rebate issue.	Develop DM FEQ pilot plan	Execute pilot test if warranted based on DM O2/NO2/NO3 source tracking results
Chemical resiliency	Risk analysis draft report, draft contingency plans, opportunities workshop. Final reports, presentations & project closeout	Final deliverable for chemical resiliency plan.	
Support troubleshooting of nitrification inhibition events at WRRFs	Coordinate with ES to select effluents of key SIUs to test. Identify SIU responsible for repeated inhibition events at FG. Document results of tests for 3 SIUs.	Coordinate with ES to identify key SIUs to test. Conduct targeted testing on SIU effluents to evaluate potential risk to DM & FG of increased industrial loadings	Coordinate with ES & conduct targeted testing on SIU effluents to evaluate potential inhibitory risk
	Conduct literature review on inhibitory potential of selected chemicals used by multiple CWS SIUs	Review & summarize published inhibition data for chemicals of interest identified by ES & other stakeholders	Review & summarize published inhibition data for relevant chemicals of interest
CREW carbon pilot		Determine cost & performance efficacy of CREW carbon as a lime alternative at RC	Finalize CREW carbon testing & determine path forward

Objective	Initiatives		
	FY 25	FY 26	FY 27
RESEARCH FOR REGULATORY COMPLIANCE			
Develop copper treatment strategy for FG compliance	Review impact of source control measures	Coordinate with RAD to conduct additional monitoring. Review impact of source control, primary clarifiers & operational changes on headworks loading & effluent copper RPA.	Review impact of source control measures on WRRF copper
	Evaluate & vet projections		
	Conduct additional testing as needed	Develop testing plan & evaluate impact of primary clarifiers at Forest Grove.	Conduct primary clarifier monitoring & operational testing as needed
Develop testing program to describe fate of phosphorus in NTS	Evaluate potential for short- & long-term increases in NTS effluent phosphorus		
	Formalize ongoing annual sampling schedule & procedures with WQL	Refine & document long-term monitoring & characterization strategy for sediment phosphorus	Review & document seasonal sediment phosphorus data
	Conduct follow-up sediment sampling & seasonal water profiles. Evaluate potential intermediate sampling location	Conduct follow-up sediment sampling & seasonal water profiles	Conduct biannual sediment sampling & seasonal water profiles
	Develop recommendations based on phosphorus projections; continue research as needed	Conduct bench tests on NTS sediment as needed	Conduct bench tests on sediment 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 & 0.3 mg/L to evaluate relationship between alum dose & effluent aluminum	Full scale testing based on MAO 3.0	
	Document MAO testing results for DEQ report		
	Conduct filter pilot		
	Coordinate with RAD on regulatory gap tool (MAO 3.0)		

Objective	Initiatives		
	FY 25	FY 26	FY 27
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)	If accurate, test alum dosing recommendations for primary effluent orthophosphate load control		
	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	Finalize development of prototype chemical management application Determine long term plan for MAIA water platform
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	
		Evaluate UFAT performance at RC & DM to determine if optimization is needed to enhance carbon production	Execute optimization if needed to improve carbon production
	Deploy routine PHA monitoring to improve fundamental understanding of BPR stability		
Evaluate alternative operating modes for improved BPR stability	DM: Document performance AB1 with larger anaerobic zone/smaller anoxic zone compared to AB2-4 & AB5	Determine if capital project for DM BPR stability improvements should proceed	Scope & execute DM BPR stability improvements project
		RC: Evaluate performance of step feed configuration vs. A2O	RC: Develop recommendations for basin configuration modifications

Objective	Initiatives		
	FY 25	FY 26	FY 27
DBP mitigation testing & modifications	Develop testing plan & identify potential modifications & operational strategies to limit DBP formation at DM. Document findings to support TPS, Operations & RAD in updating Recycled Water Use Plan.	Execute modifications to DM reuse system & Durham tertiary chloramination to assist Operations & RAD in demonstrating “no reasonable potential” for DBP formation prior to NPDES permit renewal.	Monitor DBP levels & refine operational strategies as needed to avoid reasonable potential for DBP formation.
	Provide guidance & support to Operations		
DIGESTION RESEARCH PROGRAM			
Increase understanding & monitoring of digester stability	Deploy routine testing & monitoring when suspected risk of digester failure & provide feedback to Operations	Expand experimental procedures to include additional substrates that impact stability & assess paths to analyze genomic differences. Continue routine testing & monitoring when suspected risk of digester failure & provide feedback to Operations.	Deploy additional procedures & routine monitoring when suspected risk of digester failure & provide feedback to Operations.
	Provided guidance & support to Operations		
Develop co-digestion product evaluation	Research improvements to testing procedure	Deploy testing procedure to measure biogas yields from in-house materials to use in planning for biogas utilization technologies & as flow meter validation tools	Continue to measure biogas yields from in-house digestion feedstocks & co-digestion sources, as needed & provide feedback to Operations
	Evaluate & rank potential co-digestion sources for RC	Evaluate impact of operational changes on gas recovery from in-house digestion feedstocks & quality changes	Continue to measure biogas from in-house digestion feedstocks
	Provide continuous feedback & support to Operations, management		

Objective	Initiatives		
	FY 25	FY 26	FY 27
SOLIDS PROCESSING RESEARCH PROGRAM			
eWASSTRIP	Evaluate potential benefits based on laboratory testing. Prepare a potential full-scale testing plan		
Solids processing dewaterability	CST method development & testing to correlate with polymer aging & dosing. Document results.	Established as an analytical technique. No current projects with needed CST application.	
Nanobubble impact on dewatering polymer activation	Design test plan & study impacts of nanobubbles on dewatering polymer activation	Operate pilot to determine nanobubble impact on polymer consumption. Document results.	Implement permanent nanobubble system if warranted based on testing results.
ADVANCED MONITORING PROGRAM			
Develop the ability to produce low-cost, reproducible & fully reliable data without excess maintenance	Refine rag guard	Determine path forward to meet CWS continuous sensing needs	Implement the selected datalogger/system
	Develop SOP		Update SOP for the Meadow or selected system
	Support development of Meadowboard with DS	Test Meadowboard in the field with various sensor types	If Meadow selected, replace Mayfly installations with Meadows
		Support development of WQ portal & adding data review/correction tools	Test & implement new battery & case for Meadow/ Mayfly or proprietary
Expand number of analytes, locations & make scalable & shareable	Test sensors in new applications like NTS, USGS, collection system	Develop GHG analysis methods for treatment facility applications	Apply GHG analysis methods at Durham

Objective	Initiatives		
	FY 25	FY 26	FY 27
Use sensors to solve CWS problems & develop ability to consult for others	Install NO3 sensors in DM collection system to track source		
	Collect GHG samples from WRRF processes		
	Work with RAD to solve mystery gas at Dawson Creek	Work with PSU, Field Ops & RAD to solve mystery gas at Dawson Creek	
	Replace all Dairy Creek sensors with sondes	Install & maintain level, temperature & water quality sensors at Butternut	
	Install sensors at Carpenter Creek	Install sensors at new locations as required & maintain existing sites at Fanno, Carpenter, Butternut, Thomas Dairy & Dairy Creek	
	Expand, adjust sensors at Thomas Dairy & other reuse sites	Install sensors as needed for Davis Tool application site	Install & maintain soil moisture sensors at Davis Tool
INFORM EMERGING CONTAMINANTS STRATEGY			
Understand PFAS coming to & leaving WRRFs & potential treatment effectiveness	Track & analyze PFAS in influent, effluent & biosolids over time		
	Sample between processes within WRRFs		
	Targeted sampling campaigns & experiments on sampling methodology		
	Conduct additional TOP analyses		Develop in-house TOP analysis, conduct additional analyses
	Track treatment technology developments	Track treatment technology developments Pilot PAC, if funded by WRF	Track treatment technology developments & pilot if one comes up
Track & mitigate sources of PFAS in sewershed & watershed	Measure & document progress in PFAS reductions by focus industries		
	Track other sources through collection system	Monitor domestic & commercial sanitary & stormwater	
	Widespread sampling of industries		Focused sampling of industries
	Quantify PFAS in MS4, 1200-Z, ambient, background, source water & soils	Quantify PFAS in, urban creek, source water & soils	Quantify PFAS in MS4, 1200-Z, urban creeks, source water & soils
		Background sampling (urban & rural well sampling)	Analyze results from background well sampling & use to understand TD

Objective	Initiatives		
	FY 25	FY 26	FY 27
Understand the fate of PFAS in land application of reuse & biosolids & plan for coming regulations	Further characterize PFAS in soil, groundwater & vegetation from locations of biosolids & 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	Conduct mesocosm study at Fernhill for reuse & biosolids
Develop ability to measure PFAS & other trace organics in-house	Develop in-house methods for TOP/AOF (EPA 1621)	Develop in-house methods for TOP	Develop in-house methods for TOP assay.
	Develop in-house methods for vegetation		
	Develop plan for running external samples		Work with Legal to determine if feasible to run 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.		
	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		
	Develop in-house methods for 6PPD	Track 6PPD-Q/6PPD within the watershed, sewershed, stormwater & help prepare for future regulations	
	Collect samples & study 6PPD in stormwater	Collect samples & study 6PPD from industries & commercial entities.	Collect samples & study 6PPD from industries & commercial entities.
			Develop in-house methodology for tracers
		Develop additional methods for emerging contaminants in-house	
Identify beneficial NTS cyanophage	Preliminary analysis of beneficial NTS cyanophage	Complete preliminary analysis of 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	Refine sampling methods; share MP method with broader EC community
	Continue monitoring MP through WRRFs	Investigate MP fate through tertiary treatment process	
			Expand methodology to include stormwater

Objective	Initiatives		
	FY 25	FY 26	FY 27
SUPPORT CWS PRIORITIES			
Study watershed & rivers to identify ways to optimize water quality, regulatory compliance & watershed health at lowest cost		Update Temperature Compliance Strategy	
	Work with DEQ to update the phosphorus TMDL	Support P TMDL update efforts with modeling, as needed	
	Study Hagg ML for release optimization		Test ML model suggestions for optimization of Hagg Lake releases
	Study influent temperature	Temperature balance from source to influent	
	Continue support of Dairy Creek, temperature strategy & other projects	Continue support of Dairy Creek & other projects	
	Support permit renewal analyses		
Support CWS stormwater strategy development & implementation for water quality, hydromodification & infrastructure difficulties	Support SW strategy development		
	Support MS4 model development & monitoring locations		
	Conduct hydrologic, hydraulic & modeling as needed to support conveyance & development projects		
Conduct studies to support CWS sustainability efforts on climate change, reuse & natural systems	Conduct NTS modeling & monitoring to support operation optimization	Create W2 & RAS models of NTS & conduct NTS modeling & monitoring to support operation optimization	Conduct NTS modeling & monitoring to support operation optimization
	Support reuse pilot studies with modeling & monitoring		
	Conduct modeling & monitoring for carbon footprint (inside the fence) & sequestration		
	Participate in efforts from the US Water Alliance, WRF & others to generate guidelines for carbon footprints		
	Apply DCM predictions to WQ models to predict effects of climate change & support planning	Create DCM predictions time series to predict effects of climate change & support planning	Apply DCM to W2 models to predict effects of climate change on temperature & water quality variables
	Study reuse valuation & support master plan		
	Continue tracer study at Thomas Dairy		

Objective	Initiatives		
	FY 25	FY 26	FY 27
GENETIC MONITORING PROGRAM			
Develop a panel of ddPCR biomarkers for water quality monitoring	Continue development for bacterial biomarker monitoring methods (human, waterfowl, ruminant, dog, novel SPC)		
	Continue pilot MST studies (ambient & MS4 sites)		
	Determine whether molecular coliphage methods are equivalent to EPA method	Complete work on molecular coliphage method	Complete deliverables for coliphage project
Implement biomonitoring for improved treatment process control	Continue developing relevant BPR biomarkers & RT-ddPCR methods	Continue developing relevant BPR biomarkers & RT-ddPCR methods. Apply genetic biomonitoring for BPR performance (time series data analysis)	Complete analysis & deliverables for WRF 5273
		Investigate role of phage in BPR stability	
Develop an eDNA-based metric of watershed health	Continue analyzing pilot metabarcoding data	Begin developing watershed health metric based on pilot data with stakeholder input	Continue development of watershed health metric based on eDNA data with stakeholder input
	Conduct paired eDNA/macro survey study	Analyze data from paired eDNA/macro survey study	Continue studies of macroinvertebrate eDNA methods
Deploy eDNA methods to evaluate salmonid passage in TR watershed	Develop ddPCR methods for cutthroat trout & steelhead monitoring	Complete ground truth of ddPCR methods with spawning survey samples	
	Conduct salmonid thermal passage eDNA study at RC outfall	Continue salmonid thermal passage eDNA study at RC & DM outfalls	
	Scope/plan Fanno Creek pond leveler passage study with NSES	Coordinate & facilitate Fanno Creek pond leveler passage study with NSES. Generate deliverables for DEQ	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Develop regional partnerships for monitoring key species' habitat & range using eDNA	Ground truth salmonid ddPCR methods with spawning survey samples	Partner with TSCWD & TRWC on invasive & key native species monitoring using eDNA	
	Conduct pilot studies of eDNA-based EAB monitoring with ODA, ODF & NSES	Continue pilot studies of eDNA-based EAB monitoring with ODA, ODF & NSES	Continue eDNA-based EAB monitoring with ODA, ODF & NSES
	Continue work with TRWC on Upper Willamette Basin eDNA Cooperative. Host kickoff workshop & semiannual webinar	Continue work with regional partners on Upper Willamette Basin eDNA Cooperative: plan, coordinate & execute semiannual workshop & webinar	
	Scope/plan eDNA portion of Williams Creek restoration study with TRWC & NSES	Coordinate & facilitate eDNA portion of Williams Creek restoration study with TRWC & NSES	
Establish biological impacts of reuse water on wetland ecosystems	eDNA analysis of Thomas Dairy soil samples	Integrate Thomas Dairy genetic data with other metadata & synthesize results. Expand eDNA monitoring to Davis Tool site	Continue sampling at Davis Tool for future eDNA analysis
DEVELOP AN ORGANIZATION RESEARCH STRATEGY			
Build a cohesive & inclusive R&I program	Continue to sustain & improve R&I program across CWS		
Annual development of research agenda	Annual research proposal program		
	Annual needs & expectations with stakeholders		
PARTNERSHIPS & INDUSTRY LEADERSHIP			
Lead innovation through industry & partnership	Attend & represent CWS at conferences & trainings		
	Participate in collaborations with peer utility, WRF, universities & other agencies		

Objective	Initiatives		
	FY 25	FY 26	FY 27
INTERNAL & 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	Incorporate updated climate projections into CIP planning & water quality modeling	
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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Provide design & 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	
Operational testing to support BPR stability	Performance measure	Perform BPR bioassays	Completed monthly residual	Completed monthly residual	
Increase understanding & monitoring of digester stability	Performance measure	Perform weekly digester stability tests	85% of the weeks	85% of the weeks	
Develop co-digestion product evaluation	Performance measure	Response time (feedback time)	Provide results & feedback to Ops/ES/CUOO within 4 weeks	Provide results & feedback to Ops/ES/CUOO within 4 weeks	
Advanced monitoring program	Performance measure	Milestones in Asana met on time	3	3	
Inform emerging contaminants strategy	Performance measure	Milestones in Asana met on time	5	5	
Support CWS priorities	Performance measure	Milestones in Asana met on time	4	4	
Develop a panel of ddPCR biomarkers for water quality monitoring	Performance measure	# of project milestones completed	2	2	
Implement biomonitoring for improved treatment process control	Performance measure	# of project milestones completed	1	1	
Understand impacts of MPs to the WRRFs	Performance measure	# of project milestones completed	1	1	

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Develop an eDNA-based metric of watershed health	Performance measure	# of project milestones completed	1	1	
Develop regional partnerships for monitoring key species' habitat & range using eDNA	Performance measure	# of project milestones completed	2	2	
Establish biological impacts of reuse water on wetland ecosystems	Performance measure	# of project milestones completed	1	1	
Lead innovation through industry & partnership	Performance measure	# of conference presentations given	4	4	
Train CWS staff	Performance measure	# of trainings provided to CWS staff	2	2	
Provide capacity analysis support for temporary/ industrial discharge requests	Performance measure	# of analysis performed for ES	15	15	15



FY25-27

Construction & Engineering Services

Construction & Engineering Technical Services directly manages construction work to ensure CWS capital improvement projects are built safely and promptly, follow applicable codes and permits, are consistent with technical plans and specifications, and are delivered within industry-accepted budget metrics. The team accomplishes these objectives by minimizing adverse impacts or outcomes to residents, businesses, and the public. The team's work delivers sustainable public infrastructure that protects public health, safety, water quality, and natural resources, and directly promotes core values of responsible natural stewardship and financial accountability.

Goal

- Construct capital projects using 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 enable 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

Scope

- Directly manage construction work across the five-year CIP to ensure CWS Capital Improvement projects are built safely and promptly and are delivered within industry-accepted budget metrics

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

CIP: Capital Improvement Program/Plan

FTE: full-time equivalent

ME/CECOP: Multiple Engineering Cooperative Program, Civil Engineering Cooperative Program

NSES: Natural Systems Enhancement & Stewardship department

O&M: operations and maintenance

SOP: standard operating procedure

TPS: Treatment Plan Services



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Develop, implement & manage document acceptance & transfer protocols	Work with Conveyance & TPS to identify needed SOPs for the transition & handoff of documents from design to the construction phase	Begin writing selected SOPs & implement on selected projects; adjust SOP based on outcome & lessons learned	Several SOPs have been completed and will continue to be refined. New areas for SOP development have been identified.
	Identify & develop a Design Review SOP with Conveyance & TPS to codify the expectations & input for formally reviewing plans & specifications as the design phase advances	Implement on selected projects & adjust SOP based on outcome & lessons learned	Continue to test SOPs internally with new teams and team members. Develop SOPs to be utilized by outside contractors.
Refine & Improve Procore implementation user experience	Identify roadblocks & constraints preventing the financial module to track payments & track financial trends	Implement modifications to existing workflows in Procore to track financials to help better track spending & CIP budget goals	Work directly with Procore to identify changes that need to be and can be made to better track financials
	Refine workflows for change orders to be fully electronic & not rely on printed copies for final execution	Implement redesigned workflows to lessen reliance on paper & to be more efficient in processing & paying change orders	Working directly with Procore to identify changes that need to be and can be made to improve the change order workflow
	Establish a steering committee to guide Procore implementation & use	Expand steering committee past the chartering phase to other groups (NSES) to integrate project delivery across groups more seamlessly	
	Refine existing document file storage file structure to make more user friendly & efficient	Implement on selected projects & adjust SOP based on outcome & lessons learned	Continue to test SOPs internally with new teams and team members. Develop SOPs to be utilized by outside contractors.
Resilient staffing & sustainable resources	Provide mentoring opportunities, career pathways & cross-training opportunities, career advancements previously not offered to staff	Ongoing, potentially take on ME/CECOP interns to help train future engineers	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Fill vacancies and add staff to meet current & future needs	Fill existing vacancies to meet the demands of the growing capital improvement budget & projects desired to be built		
Integrate permitting compliance & tracking into capital project delivery	Work with Capital Planning to ensure permits are properly identified, tracked & documented during the construction phase of projects	Write & implement an SOP to codify approach & pilot on selected projects	
	Ensure permits are stored in a central location in Procore for all stakeholders to readily access	Expand the SOP to other groups to make permit document management consistent across CWS	

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Develop, implement & manage document acceptance/transfer protocols	Establish SOP	75	75	100	100
Refine & improve Procore implementation user experience	Establish SOP, steering group	75	75	100	100
Resilient staffing & sustainable resources	Mentor staff, provide actionable trainings	50	50	75	75
Fill vacancies & add staff to meet current & future needs	Fill existing vacancies (3)	50	50	100	100
Integrate permitting compliance & tracking into capital project delivery	Establish SOP	75	75	100	100



FY25-27

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



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
LEARNING & GROWTH			
Improve workforce development	Review & update PDPs		
	Deploy annual conference participation plan		
	Recognize and celebrate outstanding achievements		
PROJECT PLANNING & DELIVERY: WEST BASIN			
Administration	Implement WBMP		Implement WBMP
Planning	WBMP projects		
	Council Creek PS		Council Creek PS Beaverton Interceptor
Design	Rosedale PS	Broadmore rehabilitation	Turner Creek
	RIPL Gravity Line	Foothills Park capacity upgrade	
		Quail Valley PS	
Construction	Dawson Site D		
	LID and RD projects		
EAST BASIN			
Administration	Implement East Master Plan		
Design	Metzger Trunk/Ash Creek		Dirkson WWPS
	Fanno interceptor rehab	Fanno solutions	East Basin I/I
	Tonquin PS	Cooper Mountain PS	Tonquin PS
Construction	Brookman Trunk		
	Cedar Hills I/I Phase 3		
ADMINISTRATION			
Data management	Identify appropriate locations for all categories of data	Identify storage & filing locations for documents stored on 3rd floor at ABC	Determine SOPs needed for project documentation

Objective	Initiatives		
	FY 25	FY 26	FY 27
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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Administrative	Employees attending Passport tours	4	4		
	Gallup Employee Engagement mean response score for CE		Increase from June 2022 score	Increase scores from 2024	



FY25-27

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, Construction Engineering, 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

Abbreviations

CM: construction manager
DC2: Digester complex 2
IPS: influent pump station
PLC: programable logic controllers
PM: project manager
RC: Rock Creek
RNG: renewable natural gas
UFAT: unified fermentation and thickening
VFD: variable frequency drive



PE Strength & Opportunities



Goal Sharing measure

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
Program development	Project delivery handoff from PM to CM		
	Update 2013 general conditions of the construction contract templates	Update 2013 general conditions of the construction contract templates with Legal	
	Solids processing		
		Electrical Master Plan	
Capital expansion: treatment facilities administration		Project management: \$65M capital investment	Project management: \$63M capital investment
Capital expansion: other facilities administration	Project management: \$35M	Project management: \$34M capital investment	Project management: \$15M capital investment
Capital program master plan: Durham	Predesign DC2	DC2 digester capital expansion	
	Expand & construct UFAT infrastructure	Complete construction of UFAT infrastructure	
		Predesign tertiary improvements	Design tertiary improvements
		Replace & upgrade PLC-1	Replace & upgrade PLC-1 & PLC-3
Capital program master plan: Rock Creek	Partner with NW Natural on RNG construction	Design RNG facility for biogas utilization	Pre-purchase RNG equipment, and design RNG facility for biogas utilization
	Construct primary clarifier 4	Complete construction of primary clarifier 4 capital expansion	
		Design & Construct Witch Hazel & River Road intersection improvements	
	Design digester 3 & 4 rehabilitation	Construct Digesters 3 & 4 rehabilitation	
	Continue pilot testing of inDENSE technology to increase secondary treatment capacity		
		Design Primary clarifiers 1-3 rehabilitation	Construct Primary clarifiers 1-3 rehabilitation
		Planning tertiary capital expansion	Predesign tertiary capital expansion
	Design hot water system replacement & upgrades	Construct hot water system replacement & upgrades	
		Design grit handling improvements & expansion	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Capital program master plan: Rock Creek		Prepurchase IPS VFDs Replace & upgrade PLC-7	Install & commission IPS VFDs Design reuse capital expansion Replace & upgrade PLC-4 & PLC-5
Capital program master plan: Forest Grove	Construct primary clarifiers 1 & 2	Construct primary clarifier capital expansion Replace & upgrade PLC-2	Complete construction primary clarifier capital expansion Design influent screening improvements & expansion Predesign & aeration system upgrades Replace & upgrade e PLC-3
Capital program master plan: Hillsboro	Construct High-Head Pump Station improvements	Complete High-Head Pump Station capital improvements Planning & headworks rehabilitation Replace & upgrade PLC-1	Design headworks rehabilitation
Capital program master plan: other facilities	Construct new lab Design Springer Field Operations building	Construct new lab capital investment	Complete design & start construction Springer Field Operations building

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Capital expansion: treatment facilities administration	Overall program \$ planned vs \$ spent	80%	80%	80%	80%
Capital program master plan: Durham	Durham project phasing indicator	80%	80%	80%	80%
	Durham planned vs spent	80%	80%	80%	80%
Capital program master plan: Rock Creek	Rock Creek planning project phasing indicator	80%	80%	80%	80%
	Rock Creek planned vs spent	80%	80%	80%	80%
Capital program master plan: Forest Grove	Forest Grove planning project phasing indicator	80%	80%	80%	80%
	Forest Grove planned vs spent	80%	80%	80%	80%
Capital program master plan: Hillsboro	Hillsboro planning project phasing indicator	80%	80%	80%	80%
	Hillsboro planned vs spent	80%	80%	80%	80%



FY25-27

Reuse Roadmap

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 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

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 25	FY 26	FY 27
WATER REUSE			
Urban Phase I	Provide 100% reuse water to Reserve Golf Course	Design PS at Rock Creek to expand program to the west, collaborate with WRRD	Improvements at RC to send water to Rood Bridge Park
	Partner with RUSD & TPS to modify Washington County land use permit		
	Expand reuse to Rood Bridge Park, develop partnership with City of Hillsboro. Stakeholder engagement	Deliver reuse to Rood Bridge Park	Deliver reuse to Rood Bridge Park after communications plan has been executed
	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	Partner with FO construction crew to build irrigation laterals off existing main to risers Davis Tool
	Startup & commissioning reuse water to Davis Tool	Provide 100% reuse water to Davis Tool	Startup & commissioning reuse water to Davis Tool/ Thomas Dairy
		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 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)		
BIOSOLIDS			
Improve nitrogen loading application	Evaluate agronomy automation process	In-house site authorizations	
Improve product reliability	Evaluate & improve field rotation planning	Add more Willamette Valley sites & maximize local program	
Improve communication reliability	Work with new vendor to develop communication protocols	Prevent any shutdowns due to poor communication	Quarterly meetings with plant managers and hauling company

Objective	Initiatives		
	FY 25	FY 26	FY 27
Optimize application rate	Continue PFAS study at biosolids application sites	Develop in-house soil sampling capabilities for more efficient soil analysis	Precision spreading pilot study
Provide biosolids services	Develop alternative to land application	Visit facilities performing alternatives to land application	Look for alternative crops for land application expansion

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Urban Phase I	Total gallons used for irrigation (million)	100	90	100	120
	Reuse water applied (MG)	100	90	100	120
Improve product reliability	Acres of land fertilized	22,500	22,500	22,500	22,500
Optimize application rate	Biosolids applied (dry tons)	10,200	10,200	10,200	10,200
	Acre yield rates				60 bushels winter wheat
	Improving soil health				Wheat yield
Provide biosolids services	Fuel cost (use less fuel) how do we use locally	Gallons used			Expand local program
	GHG emissions reduced (biosolids)	Unit?			Expand local program



FY25-27

NSES

Natural Systems Enhancement & Stewardship

Full-time equivalents: 27

Departmental operating budget: \$11,045,100

Natural Systems Enhancement & Stewardship plans, designs, and builds public improvement projects and programs that improve water quality and fish and wildlife habitat. NSES also provides long-term monitoring, maintenance, and care of a vast network of streams, wetlands, and forests in the Tualatin River watershed. The projects and stewardship meet several regulatory requirements by keeping rivers and streams cool, managing rain runoff, and protecting vegetation along waterways to provide multiple benefits to the community. The work of NSES, in compliance with CWS' authority under Chapter 451 of the Oregon Revised Statutes, 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 outcomes, providing land access to more than 7,000 acres of high-value natural areas, and catalyzing a broader capacity to engage diverse communities in the stewardship of the public's natural and water 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 at these widespread locations include managing native vegetation enhancement with dozens of service contractors, conducting ecological engineering design, obtaining and complying with environmental permits, overseeing the construction of capital public improvement projects, and monitoring vegetation restoration and establishment for many years after construction. Stewardship activities protect and grow the value of CWS investments in streams, wetlands, riparian forests, and other natural areas by monitoring and managing emerging threats to long-term forest health, including invasive species, wildfire, urbanization, and climate change.

Key Strategic Outcomes (KSO):



Abbreviations

GIS: geographic information system

kcal: kilocalorie

UAS: uncrewed aircraft systems












PE Strength & Opportunities



Goal Sharing measure

Department Service Levels	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Total active project acres	N/A	7,320	7,570	7,820
New active project acres	245	392	250	250
Acres of farmland enrolled in co-sponsored incentive programs	N/A	1,609	1,659	1,709
New acres of farmland enrolled in co-sponsored incentive programs	50	45	50	50
Number of new projects enrolled in co-sponsored incentive programs	6	4	6	6
Number of new access agreements executed for enhancement projects	20	10	20	20
Projects monitored & measured annually per monitoring protocol (total includes shade, vegetated & combined)	150	152	150	150
Number of UAS missions	60	50	60	60
Total thermal load reduction to Tualatin River & tributaries through riparian enhancement (kcal/day)	N/A	1,282 million	1,356 million	1,416 million
Number of contracts executed per year	200	197	200	200
Total number of native plants installed	780,000	760,500	780,000	727,000

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Cumulative stream miles enhanced starting in 2004	N/A	181	183	185
New stream miles enhanced annually	10	2	2	2
Approximate value of land contributed through transformational partnerships	N/A	\$88,300,000	\$93,296,200	\$96,377,000
Other funding leveraged through transformational partnerships	\$500,000	\$245,000	\$500,000	\$500,000
Cost per kcal of thermal credit through streamside reforestation, enrolled	< \$0.15	\$0.02	\$0.08	\$0.08
Cost per acre of land managed in Stewardship	< \$920	\$863	\$1,011	\$990
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	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. Promote inclusion & participation in activities to improve inclusive communication, strengthen department culture & deepen employee engagement.	
Plan watershed strategies	Build a guiding strategy supporting CWS' long-term regulatory compliance, watershed health & climate resilience strategic goals, foster collaborative subbasin & stormwater planning, develop resilient stream corridors approaches & identify multiobjective project opportunities through careful research, coordination & evaluation. Explore opportunities for CWS to provide services to co-implementers, developers & partners to address multiple stormwater objectives: resilient stream corridors, water quality & quantity retrofit, fee-in-lieu, regional stormwater management approaches & payment-to-provide.	
Drive data-informed ecological outcomes	Generate a proactive approach with regulatory compliance & climate adaptation. Collect, manage & report on GIS & field data. Assess program results against clear goals & measurable indicators & identify actions for improving effectiveness of nature-based solutions.	
Advance enhancement methods	Identify, pilot & evaluate on-the-ground practices to use plant materials effectively, reduce chemical use & increase effectiveness of ecological enhancement, stormwater management & nature-based solutions. Coordinate & collaborate with internal & external partners to address major regional stressors of natural system functions & values.	
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.	
Optimize delivery processes	Create & improve delivery processes that clarify & document purpose, workflow & results while reducing complexity of information systems.	



FY25-27

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

- Develop regional-scale, nature-based solutions to support NPDES and MS4 permit compliance, including thermal management, and surface and stormwater management
- Create tools and methods to monitor the effectiveness of NSES programs in meeting permit compliance and CWS strategic goals
- Provide timely, efficient, and effective services that meet the needs of CWS
- Increase the scope, scale, efficiency, and effectiveness of NSES

Advantage

- Commitment to quality and scientific credibility
- 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

Abbreviations

API: application programming interface
CIP: Capital Improvement Program
D&C: Design and Construction Standards
DS: Digital Solutions
DSL: Department of State Lands
EAC: Employee Advisory Council
EDI: equity, diversity, and inclusion
EIA: ecological integrity assessment
EMU: ecological management units
FIL: fee-in-lieu
FO: Field Operations
FY: fiscal year
GHG: greenhouse gas
GIS: geographic information system
GS: Goal Share, Goal Sharing
IGA: intergovernmental agreement
kcal: kilocalorie
LSC: local safety committee
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
RSC: resilient stream corridor
RUSD: Regional Utility Services department
SWMP: Surface Water Management Plan
THPRD: Tualatin Hills Park & Recreation District
TMP: Temperature Management Plan
TSWCD: Tualatin Soil and Water Conservation District
TT: TerraTrak
UAS: uncrewed aircraft systems
WBMP: West Basin Master Plan
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 25	FY 26	FY 27
ENSURE EMPLOYEE SAFETY			
Promote safety culture	Support work of & participate in the LCS; share & regularly evaluate safety resources, best practices, & CWS policies		
Implement safety training	Develop safety training matrix for individual positions	Ensure staff complete necessary safety training	
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	Evaluate pilot & adjust tools for next phase	Develop process & tools to support efficient delivery of team learning workshops - Implement two department-wide workshops on team-selected topics	Implement & refine tools to support effective team collaboration & communication
	Support peer learning about EDI 	Support ongoing EDI learning, integrate knowledge & diverse ecology principles	Build team capacity & develop leaders to support principles of respect, support broad access & opportunity, & ensure culturally responsive staff
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	
	Support procurement study of contractor opportunities	Implement contractor engagement action plan	
Develop & implement Gallup action plan	Focus action plan on Question 1 – “I know what is expected of me at work”	Host Gallup conversation to determine action plan focus – Implement plan with focus on the 4 Needs of Followers (Hope, Trust, Compassion, Stability)	Host Gallup conversation to determine action plan focus

Objective	Initiatives		
	FY 25	FY 26	FY 27
PLAN WATERSHED STRATEGIES			
Develop plans for natural systems & stormwater capital projects integrating regulatory requirements & watershed health	Evaluate & prioritize watershed enhancement needs & opportunities in natural systems & stormwater management		
	Identify & plan project portfolios to enroll for thermal credit, stormwater & other regulatory needs		
	Develop enhancement strategy framework & apply to priority study areas		
		Conduct retrospective of Healthy Streams Plan 2005 to document completed projects, partnerships & costs Begin scoping Healthy Streams Plan 2.0 that sets new goals reflective of the current opportunities & challenges	Develop Healthy Streams Plan 2.0 with an integrated team of internal & external partners that sets new goals reflective of the current opportunities & challenges
Develop & implement access strategies	Work with partners to facilitate access to partner-owned natural areas for enhancement & stewardship		
	Update TSWCD IGA for urban areas	Identify opportunities to adapt program & update IGA with TSWCD on cooperative agricultural water quality programs in FY27	Identify opportunities to adapt program & update IGA for collaborative regional restoration with Metro in FY28
		Investigate feasibility of establishing an enhancement program with Yamhill SWCD for priority water resources in the Tualatin River Watershed	If deemed feasible, develop an IGA with Yamhill SWCD to trial the feasibility assumptions & decisions
	Review & document NSES access agreement approaches, requirements, limitations & focus areas for acquisition		
Support integrated subbasin & project planning	Support long-term regulatory compliance & stormwater strategic roadmaps with natural system expertise		In coordination with RAD, update thermal compliance strategy to optimize a suite of synergistic strategies for compliance & watershed health; revise TLMP & support NPDES permit renewal application
		In coordination with RAD & R&I, update thermal compliance strategy to optimize a suite of synergistic strategies for compliance & watershed health	
	Explore opportunities to establish ecosystem credits or offsets in the regulatory framework & other business needs		Explore innovation opportunities with crediting tools including, HeatSource versions, cold water refuges, stream narrowing & floodplain reconnection
		Explore research priorities for nature-based compliance strategies	

Objective	Initiatives		
	FY 25	FY 26	FY 27
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	Support stormwater coordination team with MS4 activities to implement the SWMP, including permit renewal, D&C update & surface water CIP
	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.	Provide natural systems focus area expertise to planning of integrated projects, including WBMP, West Sherwood planning areas, Beaverton Creek trunk & pump stations
	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	In coordination with RUSD, support co-implementers with identifying & evaluating priority stormwater retrofit & fee-in-lieu opportunities. Support creation of policy on utilizing stormwater fee-in-lieu funds	In coordination with RUSD, support co-implementers with identifying, evaluating & developing priority stormwater retrofit & fee-in-lieu opportunities
	Evaluate methods to assess RSC approaches to manage stormwater by testing available options in pilot areas		
Develop resilient streams stormwater strategies	Support stormwater strategy development for South Bull Mountain – Kingston Terrace	Develop South Bull Mountain implementation plan to advance feasible approaches for stormwater management	
	Support City of Beaverton utility plan for Cooper Mountain by evaluating opportunities for RSC pilot approaches	Develop McKernan Creek implementation plan to evaluate feasibility of regional stormwater management approaches, such as RSC	Work with City of Beaverton to advance feasible elements of the implementation plan. Work toward implementing highest priority projects
	Support regional planning & stormwater strategy development for West Sherwood urban expansion area		

Objective	Initiatives		
	FY 25	FY 26	FY 27
DRIVE DATA-INFORMED ECOLOGICAL OUTCOMES			
Collect, manage & report ecological data	In coordination with RAD, collect, analyze & report data required for NPDES & MS4 compliance, including the temperature management plan & SWMP annual reports		
	Collect, summarize & report data supporting environmental permit compliance needs for integrated capital projects, including DSL		
		Support NPDES permit renewal process with input on TMP adaptive management & updates to the monitoring protocols	
		Collect qualitative data in support of achieving long-term milestones in EMU program	
	Conduct intensive quantitative monitoring of enhancement projects to support required regulatory reporting & adaptive management		
Analyze & evaluate watershed health, NSES results & impact	Assess overall status of benefits provided to establish targets & measures; evaluate ecosystem benefits intersection with community needs	Update & improve data-driven case study dashboard to incorporate project data from TT	
	Conduct EIA & integrate data across 3 scales: watershed, project & plot level; develop monitoring data dashboard to support metrics for project & program management effectiveness		Collect, manage & analyze data across 3 scales: watershed, project & plot level
			Develop metrics & dashboards to support project & program effectiveness
			Organize reporting & project data to use for analysis & improvement of project effectiveness
	Develop remote sensing tools to assess indicators & stressors of ecological integrity at watershed scale	Assess indicators & stressors at watershed scale; explore mapping of ash & other key tree species to facilitate management actions & provide baseline for regulatory reporting	
	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		
	Determine NSES systems needs & work with DS to acquire necessary software, licenses & other related resources		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Build & propagate knowledge system tools	Collaborate with Tree for All to establish shared measures for tree canopy & habitat connectivity	Collaborate with Tree for All to establish shared measures for tree canopy & habitat connectivity; build & support tools to support project identification	
	Further refine & apply tools for rapid, qualitative monitoring assessments to evaluate ecological conditions for combined projects; collect data at pilot projects & create prototype dashboard 	Refine project manager data dashboard to support qualitative monitoring for assessing ecological management unit resilience	
		Develop & integrate updated spatial tools for modeling canopy cover, thermal load & effective shade	
	Support GIS, UAS & knowledge system needs to manage natural system elements across CWS		
			Develop remote sensing tools to create ecological datasets
	Develop digital cartographic maps, web maps, story maps, visualizations & applications to communicate information to internal & external stakeholders		
		Advance dashboards & user interactive access to ecological data, effectiveness & project metrics	

Objective	Initiatives		
	FY 25	FY 26	FY 27
OPTIMIZE DELIVERY PROCESSES			
Improve NSES budget & business processes	Centralize budget management with NSES Operations team		
	Refine NSES budget process; communicate key NSES information & improve sorting of projects that align with Capital Planning & CWS Operations teams, including FO, Reuse & 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, training & support for project leads in Project Delivery, Stewardship & RES		
Enhance natural system asset management business systems	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	Improve TT user interface & user experience; improve workflows; refine data needs & requirements; update schema to support project planning & reporting needs	
		Begin scoping for long-term maintenance of TT application	Document application stewardship plan for TT & coordinate with DS & Metro
	Develop programmatic reports & visualizations that support shared metrics for performance excellence & continuous improvement		
	Manage data to support programmatic dashboards/visualizations		
	Establish & refine NSES project data standards; update & maintain metadata & documentation about key business data in NSES		
		Organize digital program & project files & documentation & archive obsolete information	
	Explore innovative & effective UAS applications throughout CWS & the Operations team; support Reuse, 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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Cultivate employee engagement	Percentage of staff that have documented & approved development plans	100%	100%	100%	100%
Plan watershed strategies	Total thermal credit from riparian enhancement (kcal/day)	n/a	648 million	678 million	708 million
	New thermal credit from riparian enhancement - enrolled per year (kcal/day)	30 million kcal/day	27.2 million	30 million	30 million
Drive data-informed ecological outcomes	Number of UAS missions per year collecting valuable remote sensing data	60	50	60	60
	Number of GIS work requests completed	175	195	215	150
	Projects monitored & measured annually per monitoring protocol (total includes shade, vegetated & combined)	150	152	150	150
	Other funding contributed through transformational partnerships	\$500,000	\$245,000	\$500,000	\$500,000
Optimize delivery process	Number of contracts executed per year	200	197	200	200



FY25-27

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 multiobjective 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

Abbreviations

BOR: Bureau of Reclamation
CE: Conveyance Engineering
CP2: Capital Project Permitting
D&C Standards: Design and Construction Standards
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
PS: pump station
RSC: resilient stream corridor
RTC: real-time control
SOD: Safety of Dams
SOP: standard operating procedure
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
VCAM: vegetated corridor advanced mitigation
VCEF: Vegetated Corridor Enhancement Fee





Goal Sharing measure






PE Strength & Opportunities

Table 1: Objectives & Initiatives

Objective	Initiatives		
	FY 25	FY 26	FY 27
ENSURE EMPLOYEE SAFETY			
Cultivate culture of safety	Support the work of & participate in the LSC; share & regularly evaluate safety resources, best practices & CWS policies		
Implement safety training	Develop safety training matrix for individual positions	Ensure staff complete necessary safety training	
		Develop SOPs for field safety 	
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	Evaluate pilot & adjust tools for next phase	Develop process & tools to support efficient delivery of team learning workshops	Conduct self-evaluations, midyear check-ins & performance reviews with each team member
	Support peer learning about EDI 	Build team capacity & develop leaders to support principles of respect, support broad access & opportunity & ensure culturally responsive staff.	
		Convene regular EcoTeam meetings & sponsor peer learning among ecological experts	
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	
	Support procurement study of contractor opportunities	Implement contractor engagement action plan	
Develop & implement Gallup action plan	Focus action plan on Question 1 – “I know what is expected of me at work”	Host Gallup conversation to determine action plan focus - Implement plan with focus on the 4 Needs of Followers (Hope, Trust, Compassion, Stability)	Host Gallup conversation to determine action plan focus

Objective	Initiatives		
	FY 25	FY 26	FY 27
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		
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		Convene regular EcoTeam meetings & sponsor peer learning among ecological experts	
DELIVER ENHANCEMENT			
Identify & develop enhancement projects	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		
		Identify & implement enhancement of VCAM projects to meet CWS regulatory requirements	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Deliver constructed enhancement projects	Design & permit enhancement projects: Butternut Creek Reach 2, Bethany Pond, Fanno Creek Elderberry Ridge	Design & permit enhancement projects: Butternut Creek Reach 2, Fanno Creek Elderberry Ridge, Dairy-McKay	Design & permit enhancement projects: Butternut Creek Reach 2, Fanno Creek Elderberry Ridge, Ash Creek Wetland
		Construct Rock Creek/ Bethany Pond Sanitary Protection Project	Construct Rock Creek/ Bethany Pond Sanitary Protection Project, Dairy McKay Enhancement
	Monitor & adaptively manage constructed projects to ensure desired outcomes		
Support integrated projects	Collaborate with CE on planning, design & construction/ revegetation of Metzger - Ash Creek, Fanno Integrated Solutions, Brookman Sanitary Sewer Extension	Collaborate with CE on planning, design & construction/ revegetation of integrated projects, including Beaverton Interceptor, 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, Cooper Mountain PS, Aloha PS	Collaborate with PS engineers on planning, design, construction/ revegetation of PS projects, including Scholls Country PS decommissioning, Cooper Mountain PS, Aloha PS	
Implement stormwater strategies	Identify, develop & deliver RSC projects: South Cooper Mountain, Kingston Terrace Expansion West Sherwood	Support development of implementation plans	Support development of implementation plans; deliver RSC projects based on implementation plans
		Work with co-implementers to deliver elements of implementation plans	
		Implement & maintain RTC stations for stormwater management	
Address exposed mains & laterals	Refine roles & program communication 		
	Coordinate with FO to conduct monitoring & risk assessment; develop projects		
		Plan & design exposed sanitary sewer protection projects	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Address exposed mains & laterals		Stabilize exposed lines at Fairway Drive site; stabilize exposed lines at Springville Creek at Alfalfa Drive	Stabilize exposed lines at Springville Creek at Alfalfa Drive
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		
CATALYZE COLLECTIVE CAPACITY			
Build & implement framework to guide work with land & water stewardship partners to protect natural system assets & meet regulatory & stormwater needs		Develop & maintain collaboration structure with landowner partners, including annual coordination meetings & SOPs	
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	

Objective	Initiatives		
	FY 25	FY 26	FY 27
Improve project delivery process & organization systems	Document specific enhancement implementation needs for enhancement partners for consistent implementation		
	Develop business case & deliverables templates for consistent project documentation		Develop deliverables templates & process SOPs 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	
		Work with CP2 to improve workflow & document processes, including compliance monitoring & reporting	

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Cultivate employee engagement	Percentage of staff that have documented & (approved by supervisor) development plans	100%	100%	100%	100%
Advance enhancement methods	Volume of water enhancing Tualatin River flow through water resource agreements (acre-feet)	1,305	1,316	1,316	1,316
Deliver enhancement	Native plants installed	780,000	760,500	780,000	780,000
Deliver enhancement	Number of new access agreements executed for enhancement projects	20	19	20	20
Deliver enhancement	Average cost per kilocalorie (kcal) thermal credit (enrolled)	\$<0.15	\$0.02	\$0.08	\$0.08



FY25-27

Stewardship Services

The Stewardship team cost-effectively propagates, procures, and provides plant materials and manages the Tualatin River Farm for CWS vegetation projects. Staff steward and maintain established enhancement areas to ensure function for regulatory compliance with the temperature management plan. Working with regional conservation partners and land managers is critical for access to land and 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). Investments in community-based programs return many times the value in matching funds and in-kind services and support continued public support, co-stewardship land access.

Goal

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

Advantage

- Multi-faceted, science-driven expertise and knowledge
- Incubator of innovative and proactive solutions
- Mission-motivated people
- Adept adaptive management and excellent customer service focus
- Trust-based relationships with stewardship 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

Abbreviations

CAPM: climate adaptive plant material

CCE: Communications & Community Engagement

EAB: emerald ash borer

EDI: equity, diversity, and inclusion

EDRR: early detection rapid response

EMU: ecological management unit

FO: Field Operations

IPM: Integrated Pest Management

kcal: kilocalorie

LSC: local safety committee

NSES: Natural Systems Enhancement & Stewardship department

PDP: professional development plan

SOP: standard operating procedure

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 25	FY 26	FY 27
ENSURE EMPLOYEE SAFETY			
Promote safety culture	Support work on the LSC, share & regularly evaluate safety resources, best practices & CWS policies		
	Support the work of & participate in the LSC; share & regularly evaluate safety resources, best practices & CWS policies		
Implement safety training	Develop safety training matrix for individual positions	Ensure staff complete necessary safety training	
		Develop SOPs for field safety 	Implement & refine field safety SOP 
CULTIVATE EMPLOYEE ENGAGEMENT			
Develop & implement learning objectives for NSES staff	Establish & monitor PDPs & work plans 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	Evaluate pilot & adjust tools for next phase	Develop process & tools to support efficient delivery of team learning workshops	Implement & refine tools to support effective team collaboration & communication
	Support peer learning about EDI 	Support ongoing EDI learning, integrate knowledge & diverse ecology principles	Build team capacity & develop leaders to support principles of respect, support broad access & opportunity, & ensure culturally responsive staff.
		Convene regular EcoTeam meetings & sponsor peer learning among ecological experts	
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	
	Support procurement study of contractor opportunities	Implement contractor engagement action plan	
Develop & implement Gallup action plan	Focus action plan on Question 1 – “I know what is expected of me at work”	Host Gallup conversation to determine action plan focus - Implement plan with focus on the 4 Needs of Followers (Hope, Trust, Compassion, Stability)	Host Gallup conversation to determine action plan focus

Objective	Initiatives		
	FY 25	FY 26	FY 27
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: climate change, wildfire risk 		Collaborate with conservation partners to implement & refine plans to manage risks to natural systems: climate change, wildfire, EAB
	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, conduct phytosphthora analysis	Develop & implement best management practices to repair damage: increase species diversity, address EDRR weeds, monitor for pathogens	
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 	Establish & monitor Common Gardens, study results, refine enhancement methods
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		
	Procure & supply healthy native plant materials for CWS projects & ensure long-term, cost-effective function of CWS natural assets		
	Plan & design refrigerated native plant warehouse	Design refrigerated native plant warehouse	Plan & implement facility improvements to increase efficiency & safety; design refrigerated warehouse
	Propagate, harvest & steward native plants to fill supply gaps & increase resiliency of enhancement projects		
	Partner with local native nurseries, indigenous community members & restoration contractors	Explore prescribed &/or cultural burning as plant & seed propagation	Evaluate & integrate improved stewardship methods & tools for land healing, including seed propagation, fire, plant harvesting, wildlife habitat
	In coordination with CCE, co-lead public engagement native plant events, outreach & activities		



Objective	Initiatives		
	FY 25	FY 26	FY 27
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 Creek, Fanno, Lower Gales, Rock Creek, TRNWR	Manage & monitor EMU projects at Beaverton Creek, Fanno, Lower Gales, Rock Creek, TRNWR, Metro West Basin	
	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 cost-effective management of stream miles & kcals		
	Manage IPM program for CWS		Review IPM Plan & update to improve efficacy & understanding. 
	Collaborate with stewardship partners to implement & refine plans to manage risks to natural systems, ash tree loss, wildfire		
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 to implement CWS partnership strategy to meet NSES enhancement requirements with collaborative projects	Implement & refine strategies & tools for successful team coordination on collaborative projects & co-stewardship
	Support implementation of projects, learning & connections through regional partnerships & CWS Indigenous Partners Group		
Build & implement framework to guide work with internal partners to protect natural system assets	Develop work plan to implement & measure framework	Implement work plan for coordinating with internal programs & measure framework	Implement & refine work plan for coordinating with internal programs & measure framework
	Coordinate with CCE to inform & integrate CWS partnership matrix	Coordinate with CCE to implement & integrate CWS partnership matrix	Implement & refine tools & matrix for successful team coordination

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Steward natural systems	Total active project acres	n/a	7,320	7,418	7,565
	Acres of farmland enrolled in co-sponsored incentive programs	n/a	1,609	1,659	1,709
	Total thermal load reduction to Tualatin River & tributaries (kcal/day)	n/a	1,282 million	1,356 million	1,416 million
	Enhancement projects achieving greater than 40% canopy cover, measured at five-year intervals	95%	97%	96%	96%
Catalyze collective capacity	Number of new projects enrolled in co-sponsored incentive programs	6	4	6	6
	Cumulative stream miles enhanced starting in 2004	NA	181	185	189
	Approximate value of land contributed through transformational partnerships	NA	\$88,300,000	\$93,300,000	\$96,400,000
	Cost per acre of land managed in Stewardship	<\$910	\$863	\$1,011	\$1,000
Cultivate employee engagement	Percentage of staff that have documented & approved PDPs	100%	100%	100%	100%



FY25-27

UOPS

Utility Operations & Services

Full-time equivalents: 80

Departmental operating budget: \$15,934,100

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
 C&D: Culture & Development
 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
 GIS: geographic information system
 HR: Human Resources department
 JSA: job safety analysis
 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 25 Actuals	FY 26 Estimated	FY 27 Estimated
Routine sanitary line cleaning (feet)	931,000	1,471,888	1,000,000	1,100,000
Routine sanitary line TV inspection (feet)	517,000	662,147	600,000	600,000
Routine street sweeping (miles)	11,508	11,436	11,508	11,520

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
DART score	<1.0			
Number of sanitary sewer overflows per 100 miles of collection system (per calendar year)	<2.0	0.62	1.11	<2.0
Response to customer service request	100%	100%	100%	100%

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 operating groups (WRRD, NSES, Reuse & FO)	
Improve talent retainment	Increase career progression opportunities & capacity to accomplish work	
	Work with HR & C&D – EAC to align employee input with workplace offerings	
	Update long-term operation 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 JSAs as need and safety training matrix	
	Work with field staff & Safety staff to increase understanding of safety aspects of routine maintenance & construction tasks	
Improve technical support	Partner with GIS to increase reliability of tablets & Lucity data in the field	
	Partner with DS on FO's technology BPI list	
	Contract DS/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 employee engagement action plans	
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	
	Review and update CMOM document	
FLEET MANAGEMENT		
Fleet operations	Implement high priority recommendations from Mercury's Fleet Optimization Study	
	Review alternative fuels vehicle approach	
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	



FY25-27

Field Operations Maintenance

Field Operations Maintenance includes 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, and maintaining water quality facilities.

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
- Maintaining a highly skilled and knowledgeable workforce

Scope

- Sanitary sewer, and storm sewer conveyance systems operations and maintenance

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
- 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

Abbreviations

CB: catch basin
D&C: Design and Construction Standards
DART: days away, restricted, or transferred
DEQ: Department of Environmental Quality
DS: Digital Solutions
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 25	FY 26	FY 27
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	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		Work with HR and staff to understand what is preferred for recognition	Implement employee engagement plan
SYSTEM MAINTENANCE			
Improve accuracy of asset System Maintenance (8373) inventory	Monitor key processes for acquiring critical information		
Update System Maintenance service levels	Monitor service level targets for staff that align with Performance Standards expectations		
	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	Identify & procure needed communication hardware to complete communication upgrades		
TV/FLOW MONITORING			
Provide sanitary & storm sewer TV inspection	Monitor service level targets for staff that align with Performance Standards expectations		

Objective	Initiatives		
	FY 25	FY 26	FY 27
Improve Flow Monitoring program	Adaptively manage Performance Standards		
	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	Monitor service level targets for staff that align with Performance Standards expectations		
Improve accuracy of asset inventory	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, assessment of WQF, symbolizing tasks & needed equipment		
		Work with Construction & Reuse groups to pilot increasing beneficial uses of debris streams generated by FO	

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Safety	DART score	<1.0			
Maintain high level of service & optimize performance	Overflow per 100 miles	<2.0	0.62	1.11	<2.0
Provide routine collection system maintenance	Street sweeping (in miles)	11,508	11,436	11,508	11,520
	Vegetation WQF assessments	1,160	1,118	1,160	1,175
	Sanitary sewer lines cleaning	931,000	1,471,888	1,000,000	1,100,000
	Sumped catch basin cleaning	10,927	8,271	10,927	11,000
	WQMH cleaning	2,058	1,906	2058	2060
	Sanitary sewer TV inspection	517,000	662,147	600,000	600,000
	Storm sewer TV inspection	359,705	422,973	400,000	425,000



FY25-27

Field Operations Construction

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

These programs perform both Local and Regional repair 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 construction and repair 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 , facilities, conveyance engineering, pump stations, NSES, reuse, and water resource recovery
- 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 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

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 25	FY 26	FY 27
Ensure crew safety		Maintain low levels of DART due to on-the-job injuries	
NSES collaboration	Woodard Park exposed sewer line repair	Fairway Drive exposed main project	
WRRD collaboration	Twin 24s relocation	Misc R&R construction support	
Reuse collaboration	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	Implement employee engagement plan
Expand capabilities in trenchless technologies	Demonstrate pit launch HDD machine	Test pit launch HDD machine in Field	Implement use of pit launch HDD machine
SYSTEM REPAIR & CONSTRUCTION			
System Repair (8371) project portfolio management	Monitor opportunities to work collaboratively across program areas to improve delivery of services		
	Monitor cost accounting & cost estimate for in-house & contracted projects		
	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	
LOCAL REPAIR & CONSTRUCTION			
Improve LRC prioritization & identification of 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)		
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	Contract out identified MH rehabilitation work	

Table 2: Service Level & Performance Measures

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Safety	DART score	<1.0			
Catch basin retro fit	Quantity	30	31	30	30
Capital improvement project hours	Hours		14,199.25	15,000	15,000
Required Training	Percentage completed	>95%	100%	100%	100%
MH Rehabilitation	# of MH rehab completed	100	33	50	50
Point Repairs	# of point repairs completed	30	6	30	30



FY25-27

WRRD

Water Resource Recovery Operations & Services

Full-time equivalents: 107

Departmental operating budget: \$ 37,493,000

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 68 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
- cogen: cogeneration
- DART: days away, restricted, or transferred
- FOG: fats, oils, and grease
- FTE: full-time equivalent
- 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 25 Actuals	FY 26 Estimated	FY 27 Estimated
SAFETY				
DART score	<1	1.37	1.74	<1
DEPARTMENT FTE & OPERATING BUDGET STATISTICS				
Million gallons treated	27,000	25,983	26,900	28,000
Cost per million gallons treated	\$1,200	\$1,341	\$1,243	\$1,243
Power produced (kWh)	8,00,000	7,327,471	7,300,000	7,300,000
Phosphorus recovered (tons)	700	671	712	712
Biogas flared (GHG equivalent in million cubic feet)	260	224	260	260
Natural gas therms consumed	200,000	247,257	250,000	150,000
Chemical costs per million gallons treated (\$ per million gallons)	\$220	\$221	\$221	\$221
FOG revenue	\$950,000	\$1,065,700	\$1,000,000	\$1,100,000
Septic haulers revenue	\$2.5 million	\$2.5 million	\$3 million	\$3.3 million
Struvite recovery revenue	\$250,000	\$250,000	\$250,000	\$250,000
Pieces of equipment maintained	15,500	14,150	15,194	15,500
Equipment outages (priority 1&2 work orders)	<2,000	1,846	1,900	1,900
Total gallons used for irrigation (MG)	170	118.6	160	170

Effectiveness & Efficiency Measures	Target	FY 25 Actuals	FY 26 Estimated	FY 27 Estimated
Energy neutral (electricity) cogen + solar	20%	15.5%	15%	20%
Energy produced (kWh) cogen + solar	10,000	7,327,471	7,300,000	7,300,000
Phosphorus recovered Crystal Green (tons)	600	671	712	650
Number of sewer overflows at pump station or force main	0	5	0	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)	



FY25-27

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
DM: Durham
ES: Environmental Services
FG: Forest Grove
FOG: fats, oils, and grease
FTE: full-time equivalent
FY: fiscal year
GHG: greenhouse gas
GS: Goal Share
HB: Hillsboro
Lab: Laboratory Services
mg: million gallons
MGD: million gallons per day
NACWA: National Association of Clean Water Agencies
NSES: Natural Systems Stewardship & Enhancement department
NTS: Natural Treatment System
O&M: operations and maintenance
OSP: Operations Staffing Plan
PLC: program logic controller
PM: project manager
PS: pump station, pump stations
RAD: Regulatory Affairs department
RC: Rock Creek
RRF: resource recovery facility
RIPL: new laboratory in Forest Grove
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
UOPS: Utility Operations & Services department
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 25	FY 26	FY 27
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	Use Gallup to gauge & demonstrate employee engagement with a continual improvement focus		
	Use Gallup tools & new action plan to increase employee engagement	Refocus as needed with new Gallup results to further increase engagement scores	Follow the WRRD action plans for employee engagement
Field Operations collaboration	Collaborate on construction projects & site maintenance located at RRFs & PS		
NSES collaboration	Evaluate opportunities to coordinate UAS flights to assist with understanding of gaseous emissions at RRFs		
Reuse collaboration	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	Obtain renewable energy credit for reducing GHG emissions	Further design gas use at RC & determine if cogen or other system will go into construction	Complete design of RNG project
Maximize biological phosphorus removal	Improve UFAT operations to increase capacity & redundancy of processes (convert WASSTRIP tanks to UFAT)	Optimize UFAT operations	Continue to track nitrate issues at both DM and RC facilities to enhance VFA production.
Maximize Ostara process & achieve production targets	Refine operations SOPs & preventative maintenance times to reduce downtime		

Objective	Initiatives		
	FY 25	FY 26	FY 27
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	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: Refine monitoring & response strategies	FG: Continue to refine monitoring & response strategies for TSS & thermal challenges	
	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	Begin to analyze how to close the gap between what we have & what we need 	Plan & budget higher-cost instrumentation upgrades to stations 	
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	

Objective	Initiatives		
	FY 25	FY 26	FY 27
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 Lucy 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	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Ensure a safe workplace	DART score	<1.0	0	0	0
UOPS	Treatment site support for vector/jetter work (in hours)	1,050 (in hours)	1,200	1,000	1,000
	Support weekly coordinated PS wet well cleaning efforts (in hours)	700(in hours)	700	750	750
	Support Fernhill NTS maintenance efforts, preseason & as needed with vector support (in hours)	160 (in hours)	160	160	160
	Support Fernhill Road ditch maintenance effort (in hours)	30 (in hours)	30	40	40
RAD	Help generate monthly DMRs & help compile & submit annual air discharge, biosolids, reuse reports				
	Help develop application for NPDES renewal				
ES	Lead investigation of plant upsets from influent streams	6	# instances from Rapid Response page on SharePoint (6)	# instances from Rapid Response page on SharePoint (6)	# instances from Rapid Response page on SharePoint
LAB	Support weekly lab sampling & testing of process & regulatory samples to demonstrate NPDES compliance	24,000	24,040	25,000	25,000

Objective	Measure	Target	Actual FY 25	Estimate FY 26	Estimate FY 27
Optimize methane production for beneficial use	Biogas flared (GHG equivalent)	150,000,000	150 million	150 million	150 million
	Natural gas consumed (therms)	155,000	155,000	155,000	155,000
	ADM revenue	\$500,000	\$700,000	\$700,000	\$700,000
Maximize Ostara process & achieve production targets	Phosphorus recovered (tons or per capita or per capita demand equivalent)	700 tons	671	712	700
Reuse water production	Total gallons used for irrigation (million)	170	118.6	160	170
Operational performance tracking	Max peak hour treatment facility flow (qmax)	<300MGD	<300MGD	<300MGD	<300MGD
	Platinum NACWA awards	3	2	3	3
	Gold NACWA awards	1	1	1	1
	Silver NACWA awards	0	1	0	0
	FOG/ADM/RV dump revenue	\$50,000	\$50,000	\$50,000	
	Dollars of chemicals used per MGD treated	\$225	\$221	\$221	\$221
	MGD treated (from DMR)	28,000	25,983	26,900	27,000
Revisit CMMS data structure to enhance asset management	Equipment outages (priority 1&2 work orders)	<2,000	1,846	1,900	1,900