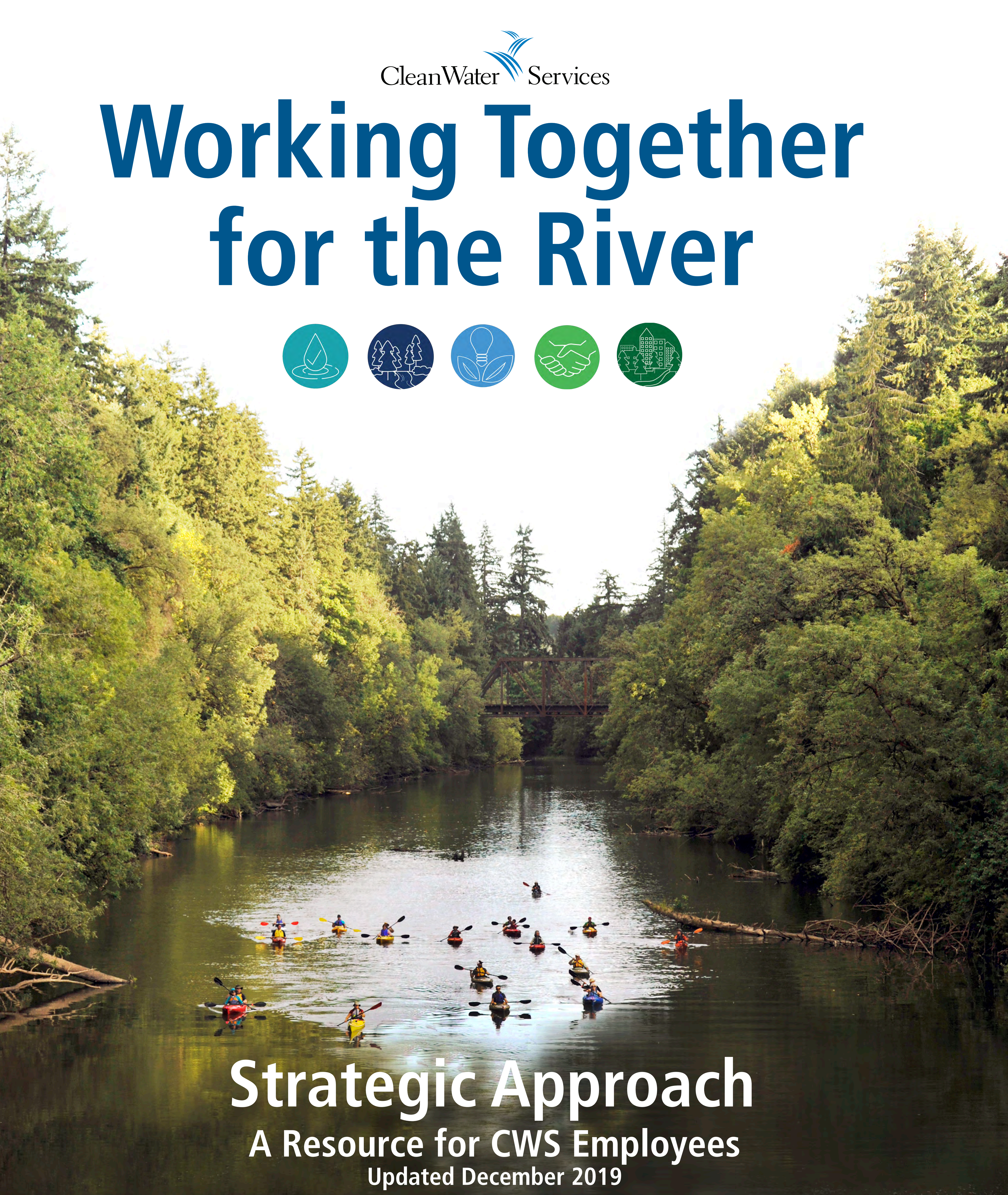


# Working Together for the River



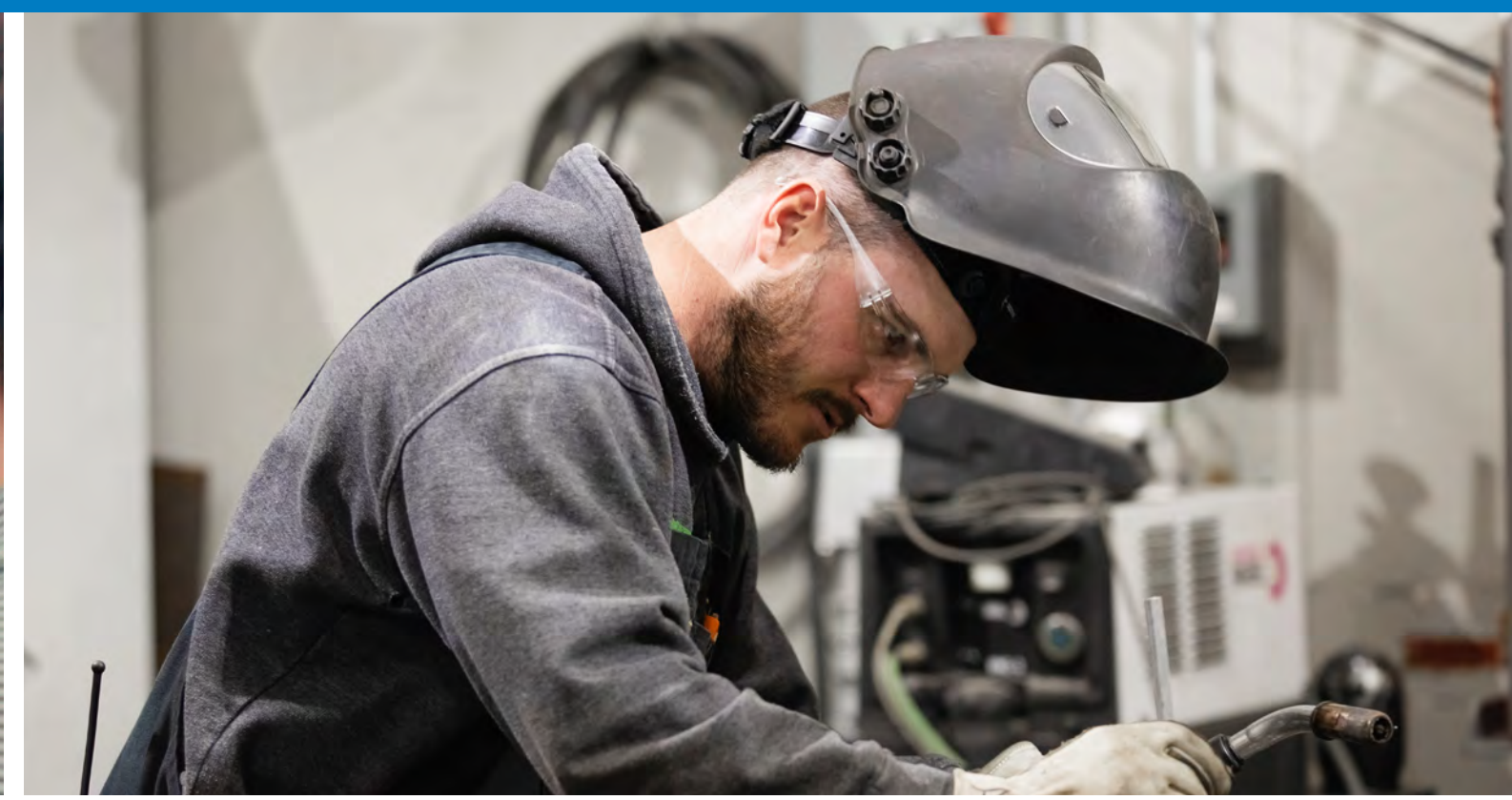
## Strategic Approach

A Resource for CWS Employees

Updated December 2019



Join in the strategic planning journey. Add your voice. Look for the Controlling Our Destiny icon on the CWS SharePoint homepage.



## Working Together for the River: A Message from the CEO



Water is the source of life, a renewable resource that has the power to bring people and nature together. All water moves through a cycle of use and reuse in watersheds throughout the world. We speak of used water, stormwater, tap water and reuse water – but it’s really One Water, cycling through a closed system that supports our ecosystem, economy and community.

Whether we are at a desk or in the field, operating equipment or monitoring processes, teaming up with nearby coworkers or partnering with stakeholders from across the region – as the people of Clean Water Services, we take pride in our stewardship of the public infrastructure while protecting public health and the Tualatin River Watershed.

Clean Water Services is recognized by industry leaders as a water resources Utility of the Future. Since our founding nearly 50 years ago, we have invested responsibly in the region. To fulfill our promise to the community and the Earth, we not only meet, but exceed and help to shape, regulatory requirements. Today, Washington County’s only river and its tributary streams are healthier than they have been in decades.

We must continue to provide the highest level of service and value to the river and the region that depends upon it. I therefore asked our Clean Water Services leaders to join me in developing a Strategic Plan. This Strategic Approach, which outlines our system and philosophy, is the first in a series of documents related to that Strategic Plan.

One of the most critical roles of the CEO is to foster positive change in the organization. My goal is to incubate an organization where staff can work innovatively and boldly with a deep connection to the organization’s strategy – so we can deliver the significant positive impact that our region and our world so desperately needs. I want all of our employees to seek, discover and master their personal and professional vision, their “ikigai.” It’s important to develop strengths, not only at the level of the individual – the “I” – but also at the level of the work group (“Us”) and the entire organization (“All”). This is the “I-to-Us-to-All” model. Tremendous power results when our human talent is fueled by a strong sense of purpose in the work that we accomplish together.

As our region grows and technology advances, we can no longer afford to view our used water as a waste to be disposed of, but rather as a source of valuable resources. We must embrace our new role as leaders in a fully circular water economy. We recover resources – clean water, fertilizer, energy and materials – for our region. This is why we will now refer to our treatment plants as water resource recovery facilities.

We are planning for the key challenges that face our river and dynamic region, including water supply and security, climate change, increasing regulatory requirements, urban growth and aging infrastructure. In doing so, we must find new ways to manage water resources, measure our performance and practice internal and external transparency across Clean Water Services and within our region. We must also honor all people in our region and workplace by embedding diversity, equity and inclusion into our services, employment practices and the way we conduct our daily business.

With thanks to the staff, partners, stakeholders and community leaders who make this work possible,

*Diane Taniguchi-Dennis*

Diane Taniguchi-Dennis  
Chief Executive Officer  
Clean Water Services  
December 2019

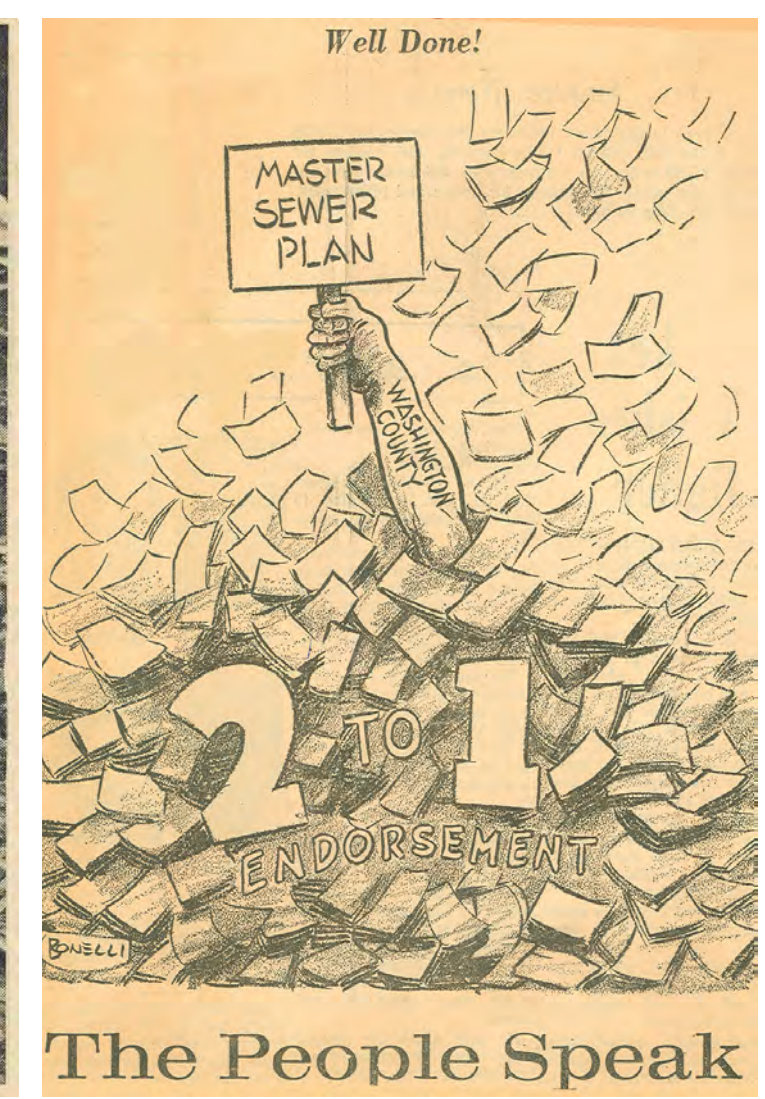
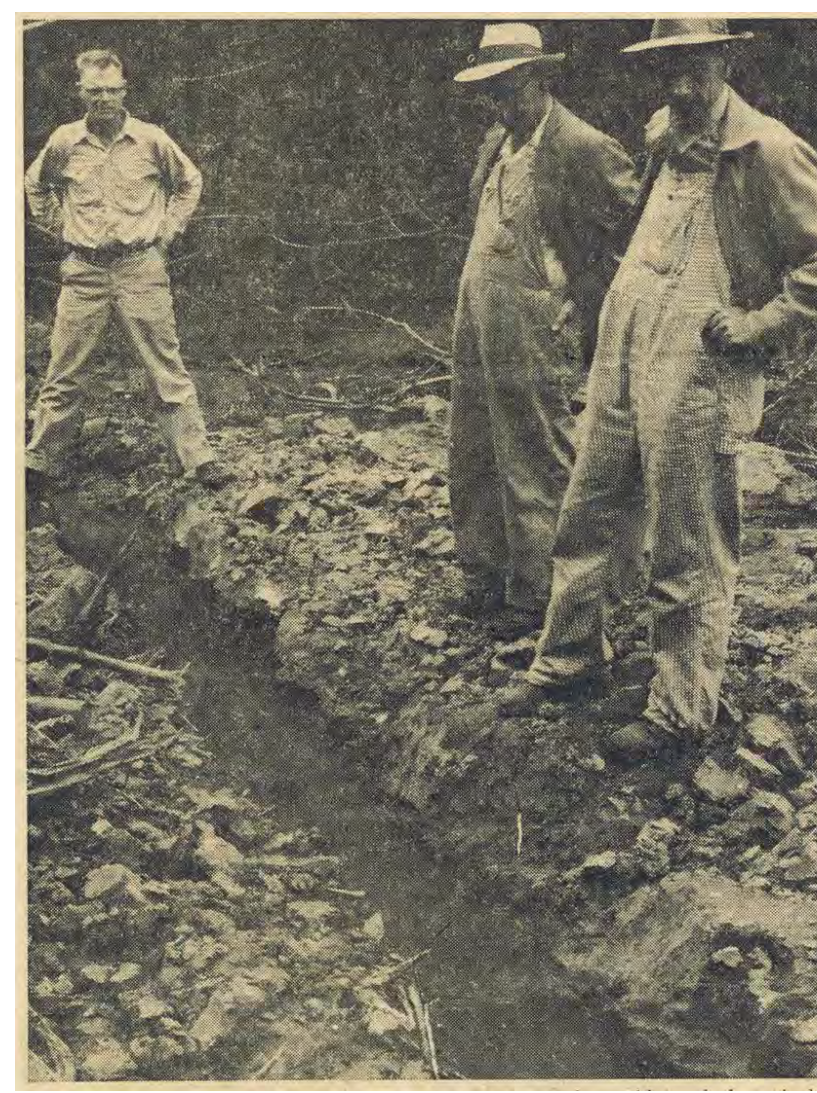
# Who We Are

Everything we do at Clean Water Services aims to protect public health while enhancing the natural environment of the Tualatin River Watershed. Combining science and nature, we work in partnership with others to safeguard the river's health and vitality, ensure the economic success of our region, and protect public health for more than 600,000 people in urban Washington County.

## Working for the River Since 1970

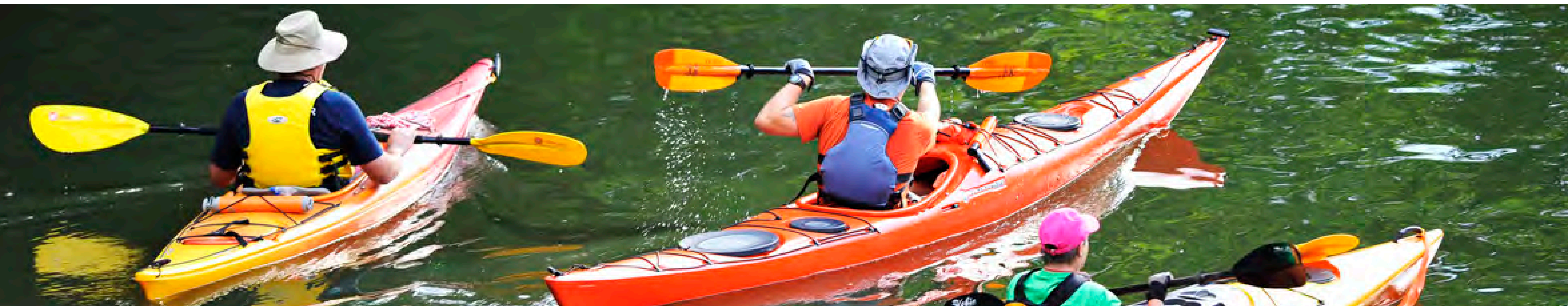
In the late 1960s the Tualatin River's flow was so inadequate, you could stand across it. Water quality was poor. It was a crisis for public health, the economy and the environment. In 1970, Washington County voters went to the polls and resoundingly affirmed their commitment to clean water, public health and the environment with a two-to-one vote in favor of creating a regional sewer utility – then known as the Unified Sewerage Agency.

In the nearly half-century since that vote, our core business has continually evolved. In 1990, for example, the region formed a stormwater management utility – and put us in charge. In 2001, we changed our name to Clean Water Services to better reflect our broader role in water resources management. In 2004, we received the nation's first watershed-based NPDES permit. That same year, with the launch of Tree for All, we ramped up our involvement in ecological enhancement and began to take restoration to scale.



In 2010, we established the Clean Water Institute, a nonprofit partner that shares expertise to benefit watersheds around the world. These are just a few examples of turning points in our past, and we know that others lie ahead, as exemplified by the projected 2023 opening of the Clean Water Research & Innovation Center, less than a mile from our Fernhill/Forest Grove facility.

We have become industry leaders recognized for pioneering smart, practical solutions for the sustainability of the precious gift that is water. We are public servants, working around the clock to protect public health and the natural environment. Together with our 12 member cities, Washington County and dozens of partners, we're working together for the river.



## Clean Water Services Today

**Our River:** The Tualatin is Washington County's only river. Eighty miles long and highly managed, with more than a dozen significant tributary creeks, it drains a 712-square-mile watershed. In its lower reaches, it's almost as flat and slow-moving as a lake.

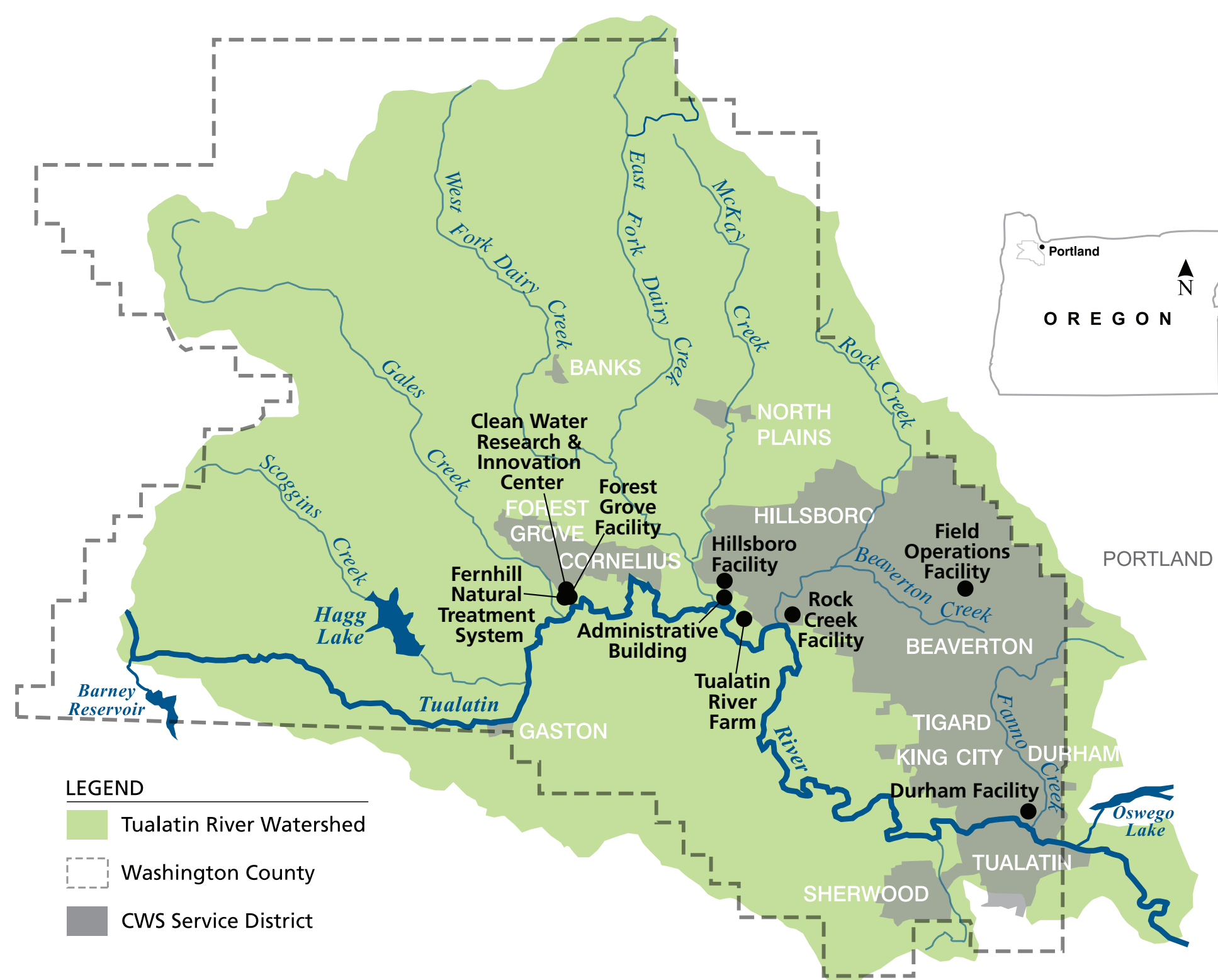
**Our Ratepayers:** CWS' main funding source is the service fees paid by 600,000+ people, businesses and industries in the cities of Banks, Beaverton, Cornelius, Durham, Forest Grove, Gaston, Hillsboro, King City, North Plains, Sherwood, Tigard and Tualatin, and urban unincorporated Washington County – plus small portions of Clackamas and Multnomah counties that naturally fall within the watershed.

**Our People:** CWS' dedicated employees bring a wealth of experience, knowledge, skills and expertise to provide services and products that deliver on the values of our region – 24 hours a day, seven days a week.

**Our County:** CWS is a county service district formed under Oregon Revised Statute (ORS) 451. We share a Board and close working relationship with Washington County, but are separately managed and financed. The Board appoints the CEO and members of the Clean Water Advisory Commission.

**Our Permit:** In 2004, the EPA issued to CWS the nation's first fully integrated municipal National Pollutant Discharge Elimination System (NPDES) Watershed-Based Waste Discharge Permit. The permit, which covers four resource recovery facilities plus urban stormwater management, was most recently renewed in 2016.

**Our Assets:** CWS' work is made possible by four resource recovery facilities, 42 pump stations, approximately 850 miles of sanitary sewer and 530 miles of storm sewer infrastructure, and many other assets, including water rights to 10% of Barney Reservoir and about 24% of Hagg Lake, and access to hundreds of restoration sites on 140+ miles of riparian corridor.





## Our Mission, Our Vision, Our Promise, Our Values

### Our MISSION

We provide cost-effective services and environmentally sensitive management of water resources for the Tualatin River Watershed.

### Our VISION

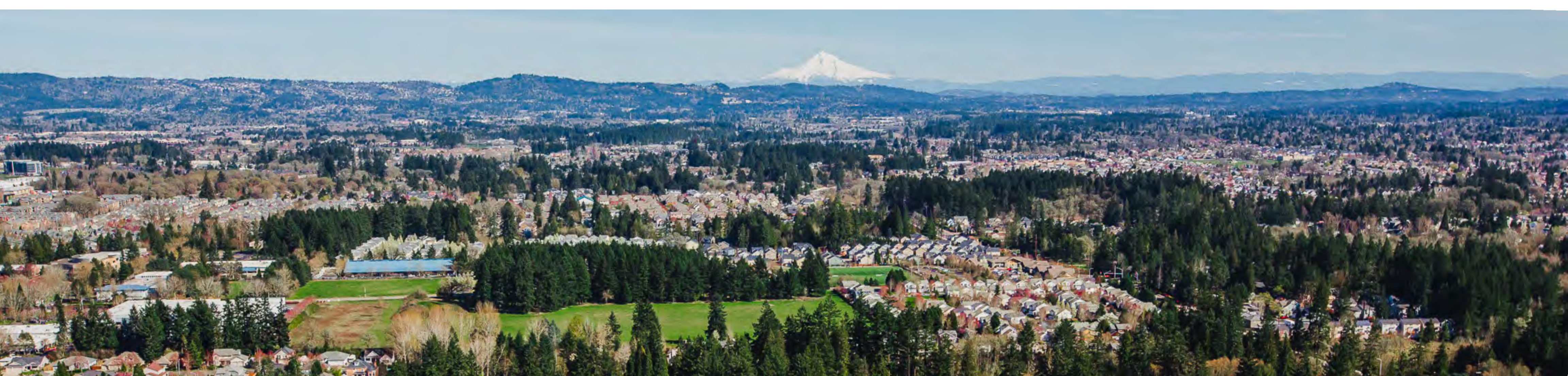
Enhance the environment and quality of life in the Tualatin River Watershed through visionary and collaborative management of water resources in partnership with others.

### Our PROMISE

Beautiful clean water for today and tomorrow.

### Our VALUES

- **A Long-Range, Comprehensive, Basin-Wide Perspective** on water resources issues, challenges and opportunities.
- **A Supportive, Collaborative, Team-Based Work Environment** utilizing timely communication and diverse backgrounds, skills and aspirations of all Clean Water Services employees.
- **Active Public Awareness and Involvement** in Clean Water Services affairs and regional water resources issues.
- **Decision-Making and Performance Management** based on up-to-date, scientific and technical information.
- **Financially Sound, Fiscally Responsible Management** maximizing value for Clean Water Services ratepayers and investors.
- **Our Employee Team** as Clean Water Services' greatest and most trusted resource and asset.
- **Protection of the Public Health and Enhancement of the Environment** through the development and delivery of Clean Water Services programs and services.
- **Quality, Cost-Effective Customer Service** supported by friendly, service-oriented personnel.
- **Strong, Visionary and Principle-Based Leadership** providing direction and purpose in the achievement of the Clean Water Services mission.
- **Technical Excellence and Innovation** in the management of Clean Water Services' water resource facilities.
- **Timely, Efficient Decision-Making at the Appropriate Level of the Organization** enabling Clean Water Services to act swiftly, responsibly and effectively.



# Working for the River Together: Our Strategic Planning Journey

This document describes the system and philosophy that guide the work of the people of CWS as we contribute — with a common purpose — toward five Key Strategic Outcomes.



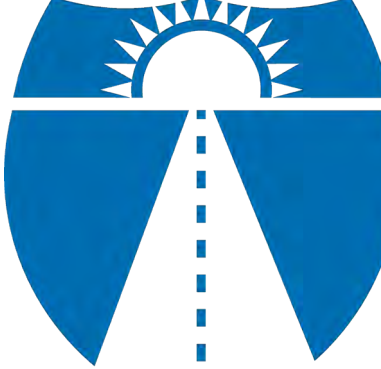
## Performance Excellence

Performance Excellence at Clean Water Services is an integrated systems approach to organization performance. We're building a diverse workforce that is committed to business process improvement, learning and growth, and to being part of a transformational and innovative clean water organization. The Performance Excellence framework focuses on people, process, planning, dialogue and implementation to help us deliver timely, responsive services and products for our customers and stakeholders — and help us deliver on the region's values. We will submit our Performance Excellence profile to the regional system, Performance Excellence Northwest, in January 2021 and prepare for a formal site visit in March 2021.


## Key Strategic Outcomes

Key Strategic Outcomes are our organization's areas of greatest expertise; those strategically important, specialized capabilities that are central to fulfilling our mission and that provide an advantage in our region and to the people we serve.

- 
**Organizational Excellence:** CWS is a highly effective and transformative organization that maximizes the capabilities, talent and effectiveness of our employees to provide services and products that deliver on the values of the region we serve.
- 
**Integrated Water Resource Management & Resilient Watershed:** In partnership with others, CWS creates resilient watersheds by optimizing and integrating the management of water resources for the benefit of the public and the environment.
- 
**Research, Innovation & Resource Recovery:** CWS provides services and products that deliver practical and pragmatic water solutions for our region to recover resources and to optimize our operations through innovation that is shared globally.
- 
**Catalyzing Transformational Partnerships:** CWS goes beyond organizational boundaries to create and sustain strategic partnerships in the region to accomplish more than any one organization can alone.
- 
**Contributing to the Region's Environmental & Economic Vitality:** CWS' sound planning, investment and stewardship in regional assets is essential to the region's Washington County's continued appeal as a place to invest, live, work and play.



**Roadmaps**  
A roadmap defines the specific strategies that we will implement as an organization to reach our Key Strategic Outcomes. Each roadmap will have an action plan that defines the resources and the time needed for implementation.



**Key Outcome Indicators**  
Key Outcome Indicators quantify the input, output and performance dimensions of our organization's performance. Our Key Outcome Indicators will allow our employees, ratepayers, Board of Directors and our region to know how well we are performing.



## Organizational Excellence

**CWS is a highly effective and transformative organization that maximizes the capabilities, talent and effectiveness of our employees to provide services and products that deliver on the values of the region we serve.**

At CWS, organizational excellence means evolving the way we provide services with our customer needs in mind, and taking on an agile and outcome-based approach. It means challenging ourselves, each other and the industry as we try new approaches. It involves mutual respect, gained by listening, understanding, dialogue and kindness. It is about getting people out of departmental silos and into multidisciplinary hubs or teams that solve issues and meet complex challenges together – from I-to-Us-to-All.

Every CWS employee is critical to the quality of life in our region and the success

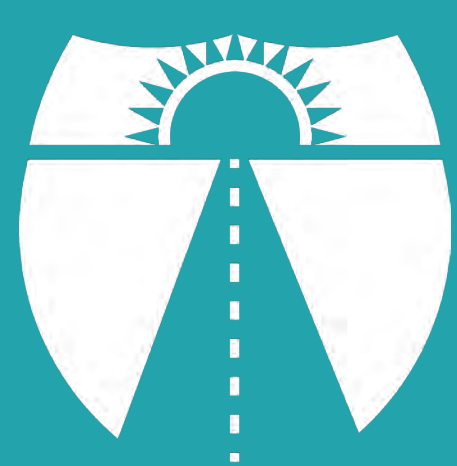
of our organization. It's important for each person to see how their individual efforts connect with the organization's mission, vision, promise and values. CWS promotes workforce and organizational success by investing in employees' learning and readiness for change.

To be effective, learning must be embedded in our culture. Workforce learning is achieved through education, training, experience and developmental opportunities that further individual growth. Organizational learning is achieved through research and development, evaluation and improvement cycles, employee input, sharing best practices and benchmarking data to achieve our Key Strategic Outcomes.

Building and managing our knowledge base are key components for delivering value for our region and sustaining our place as a

water resources industry leader. Knowledge is an asset possessed by our workforce and our organization in the form of information, ideas, learning, understanding, memory, cognitive and technical skills, insights, and capabilities. Developing methods to carry out the process of knowledge management, ensuring the approach is applied consistently, sharing refinements and innovations with departments and programs and integrating across CWS in support of our mission, vision, promise and values is key to the long-term effectiveness of our organization.

We must continue to enrich our workforce with meaningful work and entrepreneurial approaches to connect to the values of our region – all while keeping an eye on the bottom line and making timely investments in people, technology and resources.



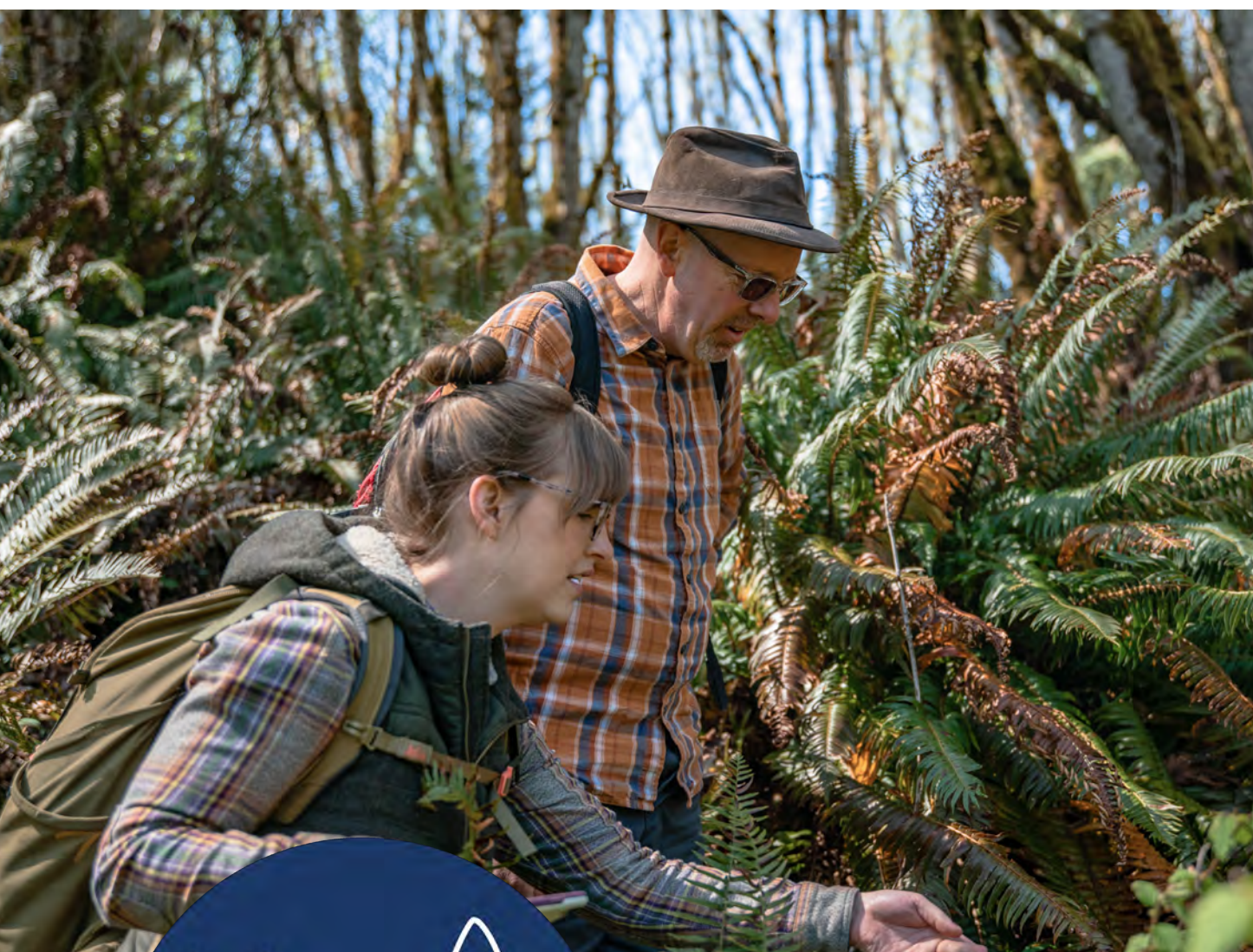
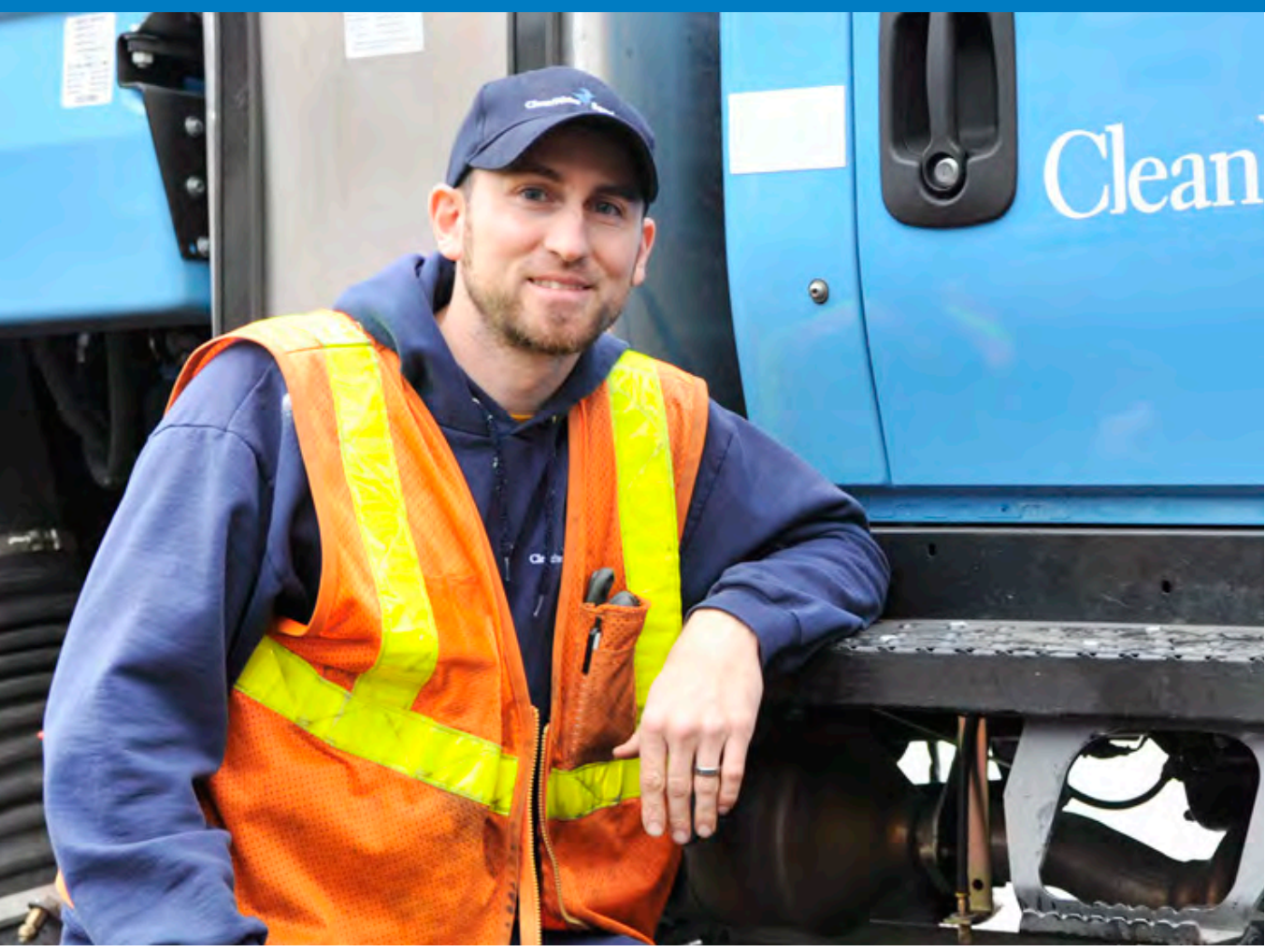
### Roadmaps: Our Plan

- Business Process Improvement
- Digital Solutions & Technology
- Diversity, Equity & Inclusion
- Human Resources & Safety
- Operational Programs
- Organizational Development
- Strategic Plan Development & Implementation
- Workforce Development



### Key Outcome Indicators: How We Measure Our Progress

- Knowledge Management
- Leadership & Employee Development
- Reputation Management
- Sustainability



## Integrated Water Resource Management & Resilient Watersheds

**In partnership with others, CWS creates resilient watersheds by optimizing and integrating the management of water resources for the benefit of the public and the environment.**

All water moves through cycles of use and reuse in watersheds throughout the world. This water cycle supports all life, our ecosystem, economy and community. Clean Water Services pioneered integrated water resources management (IWRM) that uses a One Water approach with Integrated Planning to address complex system challenges such as water quality, hydromodification, resilient infrastructure, flow restoration and long-term water supply.

We apply a suite of advanced technologies, coupled with natural treatment systems,

resource recovery, ecological enhancement, integrated planning, green infrastructure and best management practices to protect public health, improve ecology, meet regulatory requirements and provide water security for our community. We integrate skills, knowledge, expertise and workforce capacity across multiple organizations and disciplines, including our watershed's 12 cities and unincorporated Washington County, through internal collaboration and external partnerships.

IWRM is an effective approach to create the watershed resilience needed to offset the stressors associated with urbanization, increased regulatory requirements and variable climate conditions. Through this approach, we access the power of partnership and work at the scale necessary to accomplish meaningful

results. We work with timelines, budgets and levels of technical and political complexity that would be impossible to address without a firm foundation in IWRM.

CWS and our partners continually demonstrate the powerful benefits of an integrated approach that aims for watershed resilience. Only by deepening and evolving our IWRM approach can we successfully face the urgent and complex challenges to the health of the Tualatin River Watershed. Because we need the elbow room to innovate to meet the needs of our watersheds, our role includes influencing and shaping state, regional and national regulatory frameworks.



### Roadmaps: Our Plan

- Flow Management
- Future Regulatory Structure
- Integrated Planning
- Environmental Stewardship
- Stormwater Management
- Thermal Management
- Watershed Assessment
- Watershed Based Permit



### Key Outcome Indicators: How We Measure Our Progress

- Ecology & Watershed Health
- Protecting Public Health
- Regulatory Compliance
- Water & Watershed Resiliency



## Research, Innovation & Resource Recovery

**CWS provides services and products that deliver practical and pragmatic water solutions for our region to recover resources and to optimize our operations through innovation that is shared globally.**

CWS is recognized as a leader in delivering quality, cost-effective services that contribute to the well-being of the region. Through research, innovation and resource recovery, we create the products of clean water, fertilizer and renewable energy; discover new ideas and solutions; diversify revenue; and implement business opportunities to generate additional value for our customers, partners, stakeholders and the environment.

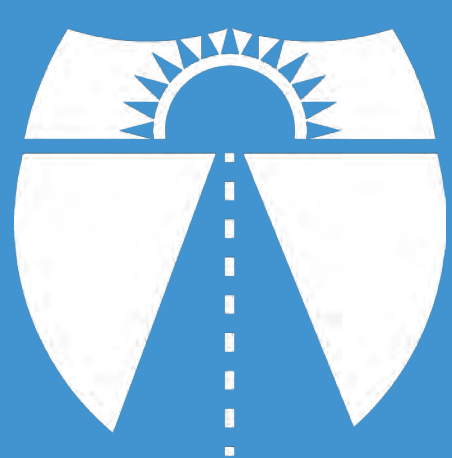
CWS is home to North America's first municipal nutrient recovery facility, Oregon's largest water reuse program, a leading renewable energy program and a first-of-its-kind natural treatment system. We hold the patent to a technology

known as WASSTRIP, which increases fertilizer production by approximately 50%. We provide more than 200 million gallons of clean irrigation water a year, and through Pure Water Brew we use a small amount of recycled water to make a big impact on the national conversation about water reuse. We produce nearly 40% of the energy needed to operate our treatment facilities. At Fernhill Natural Treatment Systems, we're expertly blending science and nature to save millions of ratepayer dollars while improving water quality and protecting valuable ecosystems.

CWS integrates information technology, operational technology and engineering technology, most notably through sensors to optimize water resource recovery operations and to guide smart stormwater systems. CWS is one of the region's first utilities to use real-time weather forecasts and sensor data to predict overall systems performance and control the flow and

treatment of stormwater. This approach allows CWS to do more with less — increasing watershed resiliency, storage and treatment capacity, while reducing the region's flooding risk and improving water quality. CWS serves as a technology incubator, helping to move ideas from proof of concept to implementation and replication.

CWS conducts research at scale, with an eye toward how the results can be put to practical use. We collaborate with universities to develop sophisticated solutions to today's most pressing environmental challenges. Looking ahead, CWS is investing in a Research and Innovation Center where our staff will develop utility-inspired technologies to create regenerative solutions to apply to natural systems, resource recovery and integrated watershed approaches. We anticipate opening the center in 2023.



### Roadmaps: Our Plan

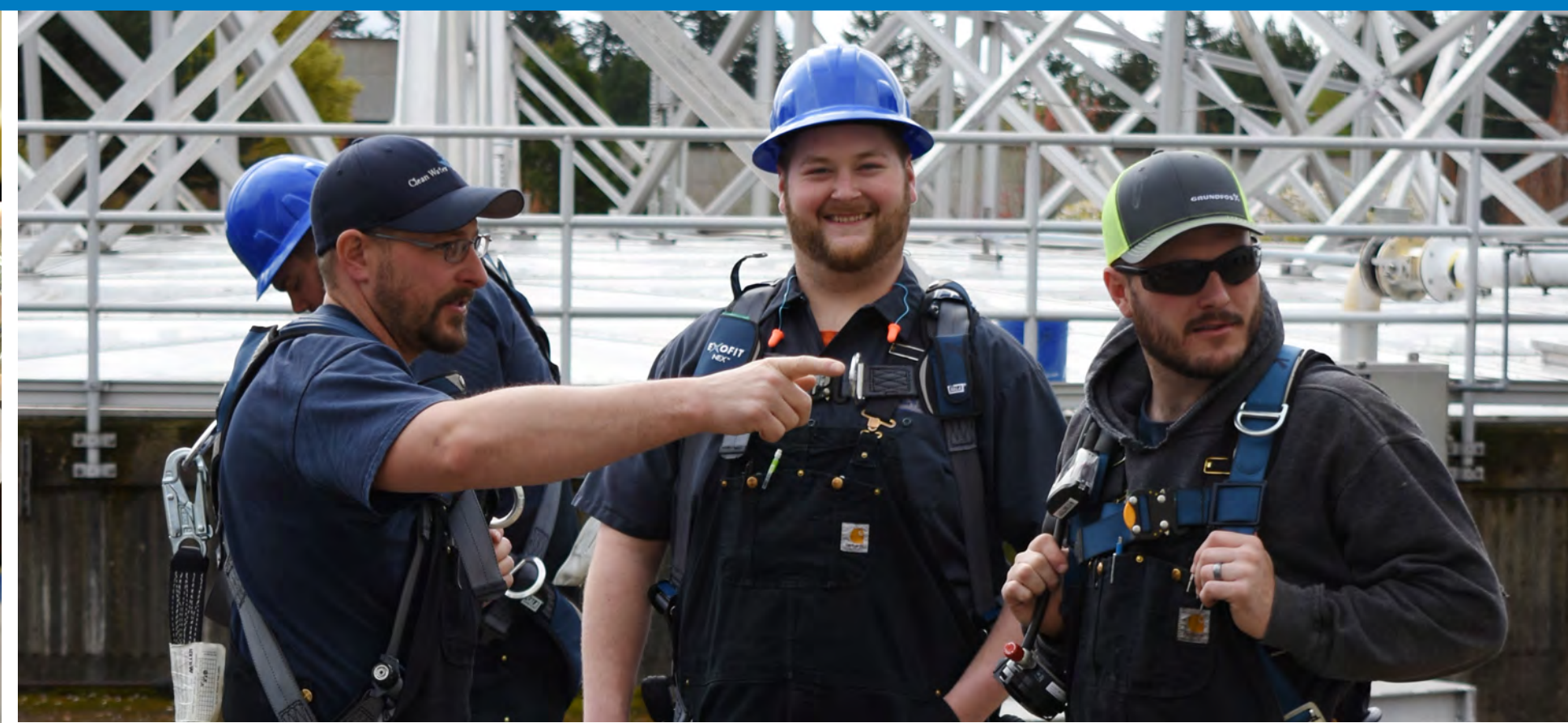
- Research & Innovation Management
- Product Development



### Key Outcome Indicators: How We Measure Our Progress

- Research & Innovation
- Resource Recovery





## Catalyzing Transformational Partnerships

**CWS goes beyond organizational boundaries to create and sustain strategic partnerships in the region to accomplish more than any one organization can alone.**

Enduring organizational partnerships go beyond the exchange of money and written agreements. They are transformational and are characterized by an alignment of missions, staff, volunteers and activities. They make it possible to work at a scale otherwise unimaginable. We collaborate across the industry with the Oregon Association of Clean Water Agencies, the Pacific Northwest Clean Water Association, the National Association of Clean Water Agencies, the Water Environment Federation, the Water Research Foundation and the WaterReuse Association to develop industrywide policy and strategy.

At the turn of the millennium, CWS was faced with a choice: Invest \$150 million in technology to chill water as it returned to the river, or find a creative way to work with Mother Nature to shade the streams.

By leveraging the collective impact of transformative partnerships, we were able to take a more cost-effective, holistic path. Today, Tree for All is one of the nation's largest and most successful landscape conservation programs. Nearly 40 partners from public, private and nonprofit sectors have joined forces to improve water quality, planting more than 10 million native trees and shrubs and restoring more than 140 river miles across 25,000 acres in the rural and urban landscapes.

Wapato Lake National Wildlife Refuge is another example of the power of partnership. A decade ago, breaks in aging levees at Wapato Lake resulted in the release of nutrient-rich water into the Tualatin River – producing an algal bloom that impacted municipal drinking, industrial and agricultural water supplies. In response, a coalition of regional partners including CWS engaged with U.S. Fish and Wildlife Service to restore the natural wetlands and create vital aquatic and terrestrial habitat. Partners have been able to leverage more

than \$3 million to advance objectives that are priorities for each organization, including our permit-driven riparian restoration program.

More recently, CWS played a leadership role in the Cedar Mill Creek Flood Remediation Collaborative, which brought together more than 20 jurisdictions, agencies, businesses and organizations to protect property from flood risk and provide quality habitat in the Cedar Mill and North Johnson Creek corridors. This initiative engaged an especially broad range of stakeholders, from the parks district and the transportation department, to developers and manufacturers. In its first year, the Collaborative gathered extensive data, conducted deep public engagement and began exploring strategies for long-term flood protection. The group produced and signed a Declaration of Cooperation, which launched one of our newest strategic partnerships: The Tualatin Watershed Enhancement Collaborative. It takes many hands working for the river.



### Roadmaps: Our Plan

- Community Engagement
- Partnership Management



### Key Outcome Indicators: How We Measure Our Progress

- Strategic Partnership Impact
- Relationships with External Constituents



## Contributing to the Region's Environmental & Economic Vitality

**CWS' sound planning, investment and stewardship in regional assets is essential to Washington County's continued appeal as a place to invest, live, work and play.**

We support our region's social readiness by nurturing a thriving community that is connected to nature and willing to invest in watershed health. The Tualatin River Watershed has experienced steady growth over the last 30 years and is expected to add an additional 122,000 people – an increase of 20% – by 2030. Holistic regional planning is essential to ensure our commitment to beautiful clean water for today and tomorrow. This includes investing in the resiliency of our workforce and facilities; programs and services; gray and green infrastructure; and the natural environment.

CWS promotes thriving households, businesses and ecosystems for generations to come by providing reliable, top-notch programs and services. CWS, the county and the cities work in partnership to provide a seamless web of services to residents and

businesses across the many jurisdictions in our watershed.

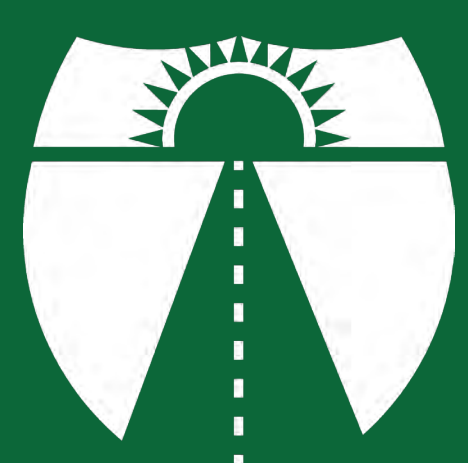
Our strategic capital investments are increasing conveyance capacity and expanding secondary treatment capacity. With investments in research, partnership and education, we will meet future regulatory requirements for stormwater management, ensure long-term dam safety and water supply, provide the region with cleaner air and beautiful natural areas within reach of every resident, and strengthen diverse communities' connections with the natural world.

Our responsible business practices benefit the community and economy. Residents and businesses can count on CWS to keep rate increases reasonable, predictable and transparent. We have built long-term financial stability and maintain adequate fiscal capacity to issue debt that is critical to fund large infrastructure projects. CWS has earned the Standard & Poor's highest rating of AAA and Moody's Investors Service

second highest rating of Aa1.

Washington County is known as the economic engine of Oregon. Clean Water Services helps keep that engine running smoothly by providing efficient services for established and new businesses and industries. We plan for growth, provide reliable infrastructure, and offer consistent and timely guidance, technical assistance and recognition. Enterprises of all types – from an established tech manufacturing firm to a new neighborhood pub – interact with the water system, and we are here to help them do so in a way that benefits all concerned.

CWS is committed to meeting the needs of today; investing to create opportunities; managing our risk and vulnerabilities; and saving for the future. That's the approach we've developed over almost five decades, and it's foundational to our future contributions to the region's environmental and economic vitality.



### Roadmaps: Our Plan

- Asset Management
- Capital Improvement Program
- Customer Service
- Long-Range Financial Planning
- Operations & Maintenance Service Levels
- Performance and Design Standards
- Regional Planning
- Strategic Risk Management Plan



### Key Outcome Indicators: How We Measure Our Progress

- Customer Satisfaction
- Financial Performance
- Financial Stewardship
- Operating Performance
- Risk Management