



TPU Director Work Plan

2021 Review/2022 Preliminary Forecast

October 21, 2021



Slide Key



2021 Work Plan

Establish and maintain an organizational culture that embraces diversity, equity and inclusion through training and employee engagement:

- Equity 101 training at 85%, will achieve goal by year end.
- Equity 101 train-the-trainer cohort of 16 employees.
- EEO training completed in Power and Water, remaining projected 2022.
- Consistent conversations around 15 questions to Becoming an Anti-Racist Leader at Executive and Senior Leader Level.

Relevant Strategic Directive

Priority as identified in the approved 2021 work plan.

Updates on 2021 activities.

2021 Work Plan

Establish and maintain an organizational culture that embraces diversity, equity and inclusion through training and employee engagement:

- Equity 101 training at 91%, will achieve goal by year end.
- Equity 101 train-the-trainer cohort of 16 employees.
- EEO training completed in Power and Water, remaining projected 2022.
- Consistent conversations around 15 questions to Becoming an Anti-Racist Leader at Executive and Senior Leader Level.

2021 Work Plan

Drive organizational implementation of TPU Racial Equity Action Plan including establishing divisional subcommittees:

- Established Equity Subcommittees in Power, Water and Customer Services to support TPU Equity Committee.

DRAFT

2021 Work Plan

With HR, champion development of dashboard to monitor progress of measurement #1:

- Dashboard in progress, first phase showcased at the August 25 PUB meeting,
- HR continues to work to connect to NEOgov for hiring information.

Lead organization through change process necessary based on Workforce Equity Study recommendations:

- Workforce Equity Study complete, awaiting HR prioritization.

2021 Work Plan

Continue to enhance and formalize TPU's anti-racist and equitable hiring, retention, and promotion practices:

- HR substantially complete with development of Equitable Recruiting and Selection Practices, will be complete by year end.
- Supporting OEHR work to develop retention strategies for BIPOC employees: establishing affinity groups in progress.



2022 Potential Areas

- Implementation of Equitable Recruiting and Selection Practices.
- Develop and implement retention strategies for BIPOC employees including expanding and enhancing affinity groups.
- Support HR implementation of Workforce Equity Study Recommendations.
- Equity Toolkit training to operationalize equity lens discipline including equity in budgeting/rates.
- EEO Training



2021 Work Plan

Review financial sustainability strategic directive and policies associated with the long range financial planning process with City Council members to seek alignment.

- Reserve policies were reviewed with GPFC Chair.
- Long Range Financial Plan for Power was reviewed with GPFC.
- Long Range Financial Plan for Water will be completed by year end.



2022 Potential Areas

- Develop 2023-24 biennial budget with final adoption by year end.
- Adopt updated Long Range Financial Plans for Power and Water.
- Adopt Rail Volume Investment Fund Policy.
- Monitor customer arrearages and share progress with policy makers.

DRAFT



2021 Work Plan

Review rate making principles with City Council members to seek alignment:

- Summer discussions with available GPFC members were conducted.

Encourage pursuit of strategic initiatives to alleviate upward pressure on rates such as innovative wholesale power products and wholesale water sales opportunities:

- Wholesale Power strategies: market - EIM, market evolution supports adjustments to wholesale transaction policies and practices; retail - electrification/EV, shorepower, electrofuel.
- Wholesale Water market based pricing structure continues to be promoted.



2021 Work Plan

Continue development of benchmark indices including impacts on income constrained customers, affordability, and economic competitiveness to other cities:

- Benchmark index refresh in progress, present topic to PUB in 2022 Q1.
- Benchmark water/power rates to other port cities complete.
- Rail rate competitiveness in progress with Rail Strategic Plan.



2022 Potential Areas

- Develop 2023-24 rate proposals for final adoption by year end.
- Evaluate and present proposed adjustments to income based portfolio of services.
- Wholesale Power modernize policies and practices with respect to changing West wide wholesale market.

SD4
Stakeholder
Engagement

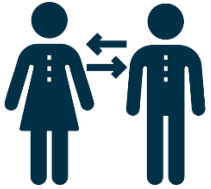
2021 Work Plan

Initiate development of language access policy in collaboration with general government:

- City Committee currently developing language access policy, TPU staff is participating.

DRAFT

SD4
Stakeholder
Engagement



2022 Potential Areas

- Continue campaign related to customer bill assistance in support of post COVID account recovery.
- Develop and implement budget and rates outreach plan with potential listening sessions.
- Adjust communication plan to align with language access policy.
- Continued outreach on AMI, prepay and portal awareness.



2021 Work Plan

Drive organizational engagement in development of the City's Climate Action Plan:

- TPU staff actively involved in development of City's Climate Action Plan, plan to be presented at November Joint Study Session.

DRAFT

2022 Potential Areas

SD5
Environmental
Leadership



- Develop TPU action plan to support City's goals identified in Climate Action Plan.

DRAFT



2021 Work Plan

Foster a spirit of innovation that values our customer preferences, enhances operational excellence and optimizes value of modernization investments:

- Pockets of excellence have emerged in key focal areas: AMI, digital customer engagement, water customer contact center modernization, data analytics, cyber security, electric vehicles, stakeholder engagement and virtual United Way campaign.



2021 Work Plan

Develop an innovation framework and initial set of metrics that help deliver high-value outcomes of TPU work groups focused on innovation:

- Utility innovation maturity benchmark and capability model presented to PUB on February 24.
- Discussed internal capabilities required to advance innovative outcomes along with potential barriers.
- Shared innovation use cases across the utility that promoted customer value, employee experience, and operational excellence.
- Convened new Customer Experience Board established to measure and promote ideas and business cases for transforming our customer experience.



2022 Potential Areas

- Implement use case scoring model to promote innovative outcomes across dimensions of value to customer, value to enterprise, and complexity to implement.
- Continue to drive Customer Experience Board to enhance customer value across all divisions.
- Develop use case dashboard to facilitate directive activity planning and reporting.
- Develop periodic innovative showcase events and potential for Directors Innovation Award.



2021 Work Plan

Continue enhancing comprehensive Continuity of Operations Plan (COOP), complete baseline COOP and develop essential function and communication plans:

- COVID response continues to occupy the majority of the focus: reconstitution efforts active at this time.
- COOP all hazard plan progress continues with anticipated draft completion by year end.
 - Reconstitution plan being developed in response to COVID will be maintained long-term and incorporated into TPU's COOP
- General preparedness efforts (internal and external) continue to progress: brochures and videos (internal) complete; website (external) delayed to 2022.



2021 Work Plan

Continue enhancing comprehensive Continuity of Operations Plan (COOP), complete baseline COOP and develop essential function and communication plans:

- General preparedness efforts (internal and external) continue to progress: brochures and videos (internal) complete; website (external) delayed to 2022.
 - Bucket List Video completed <https://vimeo.com/589138139/b4c8762a00>
 - Water holding 3 preparedness lunch and learns in November and December

2021 Work Plan

SD7
Reliability and
Resiliency



Complete hazard specific annex for each operating division with special focus on earthquake preparation for Cascadia 2022 and wildfire

- COOP development is proceeding as “all hazard” development.
- Wildfire: T&D met with fire partners to enhance coordination, draft EAP supplement for Generation.
- Earthquake annex work delayed due to staff capacity constraints. Cascadia 2022 likely will involve review of lessons learned from 2016 exercise to inform future actions and updates to COOP/annex.

2022 Potential Areas

SD7
Reliability and
Resiliency



- Post pandemic reconstitution.
- Cascadia 2016 after action information to inform COOP earthquake annex.
- Continue to develop general preparedness toolkit for employees and customers.

DRAFT



2021 Work Plan

Implement annual contract review strategy related to the public-private partnership and lead first annual contract review:

- Completed first annual contract review (PUB meeting).

Support community related digital equity initiatives including development of the 30 free Wi-Fi community sites per the public private partnership agreement:

- Inventory of potential public interest sites has commenced.



2022 Potential Areas

- Implement public process to pursue development of 30 free community Wi-Fi spots.

DRAFT



2021 Work Plan

Drive organizational engagement in business retention and recruitment, evaluate competitiveness of rates, fees, and taxes in benchmarking with target markets:

- Business retention and recruitment continued to be primary focus as reported to the PUB on May 12.
- Considerable focus on attracting clean fuel producers, specifically green hydrogen.
- Supporting the Council's efforts to develop the Tideflats Non-Interim regulations.
- Benchmark water/power rates to other port cities is complete.
- Rail rate competitiveness in progress with Rail Strategic Plan.



2021 Work Plan

Expand organizational engagement in workforce development including opportunity for diversity of and upskill to talent pipeline:

- Workforce development focus on diversifying the talent pipeline continues with recent efforts associated with power pre-apprenticeship and water apprenticeship revamp.
 - Early success with SEED internship program.
 - Letter of support for Palmer Pathways Pre-Apprenticeship Program issued in 2021 for potential opportunity in 2022.
 - Significant enhancement to TPU academy: expanded virtual program and includes east side.
 - Delivered two cycles of teacher workshops (10 sessions) related to environmental challenges.



2022 Potential Areas

- Community awareness conversations regarding decarbonization of transportation and industrial manufacturing, specifically the role of green hydrogen.
- Pursue expanded opportunities to build diverse talent pipeline in disciplines that traditionally have lacked diversity including interns, pre-apprenticeships, apprenticeships and engineers.
- Seek to secure new and expanding industrial customers in Fredrickson, and analyze the utilities' infrastructure regarding their ability to meet the potential demand, in particular Fred 310.
- Provide subject matter expertise into the Tideflats subarea planning process regarding industrial land use regulations.



2021 Work Plan

Continue to enhance positive and collaborative working relationship with City, seek alignment of policies and strategies established by PUB to City Council priorities.

- Ongoing engagement with Mayor, City Council and general government staff on City matters and legislative matters.
- Extensive coordination with Environmental Services on utility bill customer arrearages.
- Joint effort with City to obtain Electrification of Transportation grants for EV charging station in downtown.
- Actively involved in Climate Action Plan, Decarbonization Resolution, Fleet PMP, Antiracist Transformation, Non-interim Regulations, and Employee Survey follow up actions.



2021 Work Plan

Strengthen coordinated reporting of TPU efforts through quarterly Council Committee Chair meetings.

- Quarterly meetings occur consistently with a good exchange of information on PUB activities and potential areas of interest for committee reports. Many topics from those meetings have advanced to either committee reports or one-on-one Council follow up.



2022 Potential Areas

- Develop TPU action plan to support City's goals identified in Climate Action Plan.
- Continued involvement in Antiracist Transformation with respect to mission of utility services at TPU.
- Budget and Rates and AMI/portal outreach.



2021 Work Plan

Drive organizational engagement in development of City's Climate Action Plan

- Key staff actively involved in development of City's Climate Action Plan – plan to be presented at November Joint Study Session.

DRAFT



2021 Work Plan

Identify and execute opportunities to leverage new rate tariff provisions that support community and customer decarbonization goals to promote use of hydropower in pursuit of green economy.

- Transportation Electrification
 - Public EV and multifamily charging station pilots fully subscribed with 64% and 50% in low opportunity areas, respectively.
 - EV School Buses in Franklin Pierce and University Place School Districts
 - Pole mounted EV charging in Business District set to launch Fall 2021
- Active involvement in pursuing opportunities related to green hydrogen.
 - Tacoma Power is part Washington Maritime Blue's hydrogen cluster that has responded to Secretary Granholm's 'Earthshot' initiative.
 - Active engagement with site developers for potential green hydrogen facilities.



2022 Potential Areas

- Develop TPU action plan to support City's goals identified in Climate Action Plan.
- Continued engagement in partnerships for green hydrogen hub.
- Implement 2022 Action Report Initiatives related to Tacoma Power's Electrification Transportation Plan.



2021 Work Plan

Leadership will champion safety as a key organizational value. Leadership will be genuinely interested in workplace safety, available to address workers concerns, and accountable for creating a safe work environment.

- Broad progress on City-wide safety initiative initiated by TPU was presented to the PUB on April 14.
- Continued progress across the city with SCEW and START Safety Culture training.
- KPI training for Corrective Actions and Leadership Engagements continues.
- Expanded efforts include situational awareness and de-escalation training.



2021 Work Plan

Guide TPU reconstitution to include policies that enable TPU resilience in light of COVID-19 disruption including transition to post-emergency telework.

- Reconstitution was paused due to Delta variant. Work groups continue to work through post-emergency telework planning for eventual transition with reconstitution.



2021 Work Plan

Champion TPU anti-racist transformation through implementation of TPU Racial Equity Action Plan with focus on:

Continuing to enhance and formalize TPU's anti-racist and equitable hiring, retention, and promotion practices:

- HR substantially complete with development of Equitable Recruiting and Selection Practices, will be complete by year end.
- Supporting OEHR work to develop retention strategies for BIPOC employees: expanding affinity groups.



2021 Work Plan

Disaggregating employee survey data by race and gender and applying an equity lens to reduce or eliminate any significant disparities

- Employee survey results analyzed and delivered in Q1 to TPU & City leadership.
- Results disaggregated by race and gender.
- Collaborating with OEHR/HR on strategy for areas of opportunity.



2021 Work Plan

Identify and implement plans to address one key area of focus TPU wide (based on employee survey results) to continue enhancing employee experience.

- Survey results presented to PUB on April 24.
- City-wide focus on DEI initiatives, field employees, and results associated with the question “Employees can express ideas/views without fear of negative consequences.”



2021 Work Plan

Champion organizational change process necessary to implement the Compensation and Classification study recommendations.

- Survey is being led by HR, limited detail has been available to-date, compressed timeline for implementation is a challenge.

Evaluate succession planning needs particularly with respect to senior leadership roles.

- Working with HR, current and past practice was inventoried. Initial discussion with new HR Director and City Manager was held. Ability to advance depends on HR capacity.



2022 Potential Areas

- Continue to drive Safety Culture to improve employee relationships and reduce workplace injuries.
- Post COVID, complete reconstitution and transition to future telework policy.
- Support HR in developing and implementing final phases of class & comp study.
- Continue efforts to address employee survey feedback related to “Employees can express their ideas/views without fear of negative consequences”.



2021 Work Plan

Guide customer recovery post COVID-19 including developing or modifying at least two programs or services to aid customers with bill resolution.

- Pending - City continues to operate under Emergency Declaration with a utility disconnect moratorium in place.
- Development of bridge period logistics continues.
- Launched targeted customer outreach campaign to connect customers with assistance dollars available.
- Repurposing of BCAP budget dollars anticipated once other federal funds (LIHEAP, LIWAP) are being distributed and gaps are known.



2021 Work Plan

Champion customer service transformation leveraging utility modernization investments such as Advanced Meter Infrastructure and Customer Portal to realize value to customer. Drive mass meter deployment including system integration while maintaining bill accuracy in transition to monthly billing and customer confidence.

- Update provided to PUB on October 13.
- AMI communication network 95% complete; more than 50,000 meters deployed.
- Developed Water grant & loan program for customer service lines.
- Implemented customer outage map & reporting capabilities.
- 3 meter read routes converted to monthly billing.
- Portal development continues; phase 2 release planned early 2022.



2021 Work Plan

Disaggregate customer satisfaction survey data by race and apply an equity lens to reduce or eliminate any significant disparities:

- 2021 residential Customer Satisfaction Survey completed, PUB presentation scheduled for October 27th.
- Results disaggregated by race.



2021 Work Plan

Track successful use of equity index and facilitate workshops to share insights and awareness to staff throughout the organization.

- Developed and implementing expanded City of Tacoma Equity Map to include Tacoma Power and Tacoma Water service territories.
- Detailed report provided to PUB in August 25 SD1 update including: EV charging stations, residential conservation, evergreen options.
- Developing plan for Equity Toolkit to operationalize equity lens discipline.



2022 Potential Areas

- Customer Interaction Center (CIC0) project scoping by end of 2022
- Continue campaign related to customer bill assistance in support of post COVID account recovery.
- Evaluate and present proposed adjustments to income based portfolio of services.
- Continued development of strategic plan related to customer experience in light of utility modernization progresses.
- Explore pay box language enhancement.
- Continued outreach on AMI, prepay and portal awareness.



2021 Work Plan

Champion Tacoma Rail Strategic Planning process.

- Tacoma Rail Strategic Plan is on schedule to be complete by year end. A draft of the plan will be presented to the PUB at the October 27 meeting.

Facilitate Energy Imbalance Market planning and preparation to facilitate 2022 market participation.

- On schedule; projected March 2, 2022 go live.
- Energy Trading and Risk Management Project completed, securing path for favorable progress on meeting the WEIM timeline, presented to PUB on July 14.



2022 Potential Areas

- Complete transition to participate in Western Energy Imbalance Market.
- Develop action plan for adopted Rail Strategic Plan.

DRAFT

2022 Potential Areas Summary

SD1 – Equity and Inclusion

- Implementation of Equitable Recruiting and Selection Practices.
- Develop and implement retention strategies for BIPOC employees including expanding and enhancing affinity groups.
- Support HR implementation of Workforce Equity Study Recommendations.
- Equity Toolkit training to operationalize equity lens discipline including equity in budgeting/rates.
- EEO Training

SD2 – Financial Stability

- Develop 2023-24 biennial budget with final adoption by year end.
- Adopt updated Long Range Financial Plans for Power and Water.
- Adopt Rail Volume Investment Fund Policy.
- Monitor customer arrearages and share progress with policy makers.

SD3 – Rates

- Develop 2023-24 rate proposals for final adoption by year end.
- Evaluate and present proposed adjustments to income based portfolio of services.
- Wholesale Power modernize policies and practices with respect to changing West wide wholesale market.

SD4 – Stakeholder Engagement

- Continue campaign related to customer bill assistance in support of post COVID account recovery.
- Develop and implement budget and rates outreach plan with potential listening sessions.
- Adjust communication plan to align with language access policy.
- Continued outreach on AMI, prepay and portal awareness.

SD5 – Environmental Leadership

- Develop TPU action plan to support City’s goals identified in Climate Action Plan.

SD6 - Innovation

- Implement use case scoring model to promote innovative outcomes across dimensions of value to customer, value to enterprise, and complexity to implement.
- Continue to drive Customer Experience Board to enhance customer value across all divisions.
- Develop use case dashboard to facilitate directive activity planning and reporting.
- Develop periodic innovative showcase events and potential for Directors Innovation Award.

SD7 – Reliability and Resiliency

- Post pandemic reconstitution.
- Cascadia 2016 after action information to inform COOP earthquake annex.
- Continue to develop general preparedness toolkit for employees and customers.

SD8 - Telecom

- Implement public process to pursue development of 30 free community Wi-Fi spots.

2022 Potential Areas Summary

SD9 – Economic Development

- Community awareness conversations regarding decarbonization of transportation and industrial manufacturing, specifically the role of green hydrogen.
- Pursue expanded opportunities to build diverse talent pipeline in disciplines that traditionally have lacked diversity including interns, pre-apprenticeships, apprenticeships and engineers.
- Seek to secure new and expanding industrial customers in Fredrickson, and analyze the utilities' infrastructure regarding their ability to meet the potential demand, in particular Fred 310.
- Provide subject matter expertise into the Tideflats subarea planning process regarding industrial land use regulations.

SD10 – Government Relations

- Develop TPU action plan to support City's goals identified in Climate Action Plan.
- Continued involvement in Antiracist Transformation with respect to mission of utility services at TPU.
- Budget and Rates and AMI/portal outreach.

SD11 – Decarbonization/Electric Vehicles

- Develop TPU action plan to support City's goals identified in Climate Action Plan.
- Continued engagement in partnerships for green hydrogen hub.
- Implement 2022 Action Report Initiatives related to Tacoma Power's Electrification Transportation Plan.

SD12 – Employee Relations

- Continue to drive Safety Culture to improve employee relationships and reduce workplace injuries.
- Post COVID, complete reconstitution and transition to future telework policy.
- Support HR in developing and implementing final phases of class & comp study.
- Continue efforts to address employee survey feedback related to "Employees can express their ideas/views without fear of negative consequences".

SD13 – Customer Service

- Customer Interaction Center (CIC0) project scoping by end of 2022.
- Continue campaign related to customer bill assistance in support of post COVID account recovery.
- Evaluate and present proposed adjustments to income based portfolio of services.
- Continued development of strategic plan related to customer experience in light of utility modernization progresses.
- Explore pay box language enhancement.
- Continued outreach on AMI, prepay and portal awareness.

SD14 – Resource Planning

- Complete transition to participate in Western Energy Imbalance Market.
- Develop action plan for adopted Rail Strategic Plan.