



CLACKAMAS

WATER
ENVIRONMENT
SERVICES



CLACKAMAS WATER
ENVIRONMENT SERVICES

Strategic Plan

2025



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On behalf of Clackamas Water Environment Services (WES), I am pleased to present our 2025 Strategic Plan. With a solid plan in place, WES will be able to fulfill its charge of producing clean water, protecting water quality, and recovering renewable resources for its unique and diverse service area. This plan, with input from staff throughout the organization, outlines how WES can build a more resilient future for the organization, its people, and its customers. The strategic initiatives outlined in the plan are intentionally designed to help us realize our vision of a clean water future for all in the most fiscally responsible manner possible. To do all this effectively and efficiently, we must be strategic and vision-focused in our work. This plan aims to set our priorities, focus our energy and resources, strengthen our operations, and ensure that employees and stakeholders are working in partnership toward common goals.

This past year, we refreshed our vision, mission, and values to articulate the foundation for our operations more clearly and to drive our day-to-day work. At WES, we have never been more focused on what's critical to the nature of our work, our service area communities, our people, and the public we serve. Our communities count on us to meet their evolving needs. Like other organizations, we have had to learn to navigate an ever-changing landscape riddled with challenges. However, our effective planning has provided us the guidance to make wise financial decisions to ensure we have the resources to fully meet our mission and obligations to the people we serve. Despite the challenges foreseen and unseen, we remain excited for our future and our commitment to building a resilient clean water future where all people benefit and rivers thrive.

Warm regards,



Greg Geist

WES Director

A young girl wearing a straw hat and a white shirt stands in a shallow stream, holding a net. The background is a lush green forest. A large, semi-transparent quote is overlaid on the right side of the image.

Our plan guides the work we do each and every day to ensure that our many diverse communities enjoy the benefits of safe, healthy water for generations to come.”



About the District



WES produces clean water and protects water quality for seven cities and a large swath of unincorporated urban Clackamas County. We operate and maintain five water resource recovery facilities, 23 pumping stations, and nearly 360 miles of pipes. Each year, we clean more than seven billion gallons of wastewater, while converting the treatment byproducts into electricity and natural fertilizer. We also work to reduce pollution in local rivers, streams, and wetlands caused by urban stormwater runoff. We educate and assist community members from all walks of life, from developers, property managers and homeowners to government agencies, local businesses, teachers, and students.

WES is recognized as an industry leader in sustainability and organizational excellence. In 2021, we received the prestigious Water Heroes Award from the Water Environment Federation for our exceptional response to a cataclysmic ice storm. In 2022, WES was honored with national and regional awards reaffirming our dedication to our mission and district communities. Just recently, we received a 2023 Achievement Award from the National Association of Counties for our community engagement work on a new outfall project. Finally, for the past 28 consecutive years, WES has received Certificates of Achievement for Excellence in Financial Reporting.

From a financial perspective, WES currently has the highest credit rating assigned by S&P Global, reflecting our commitment to fiscal responsibility. We are committed to keeping rates affordable and maintaining monthly service rates in line with the local area average while meeting the needs of growing communities and replacing aging infrastructure. WES is also committed to assisting our customers. We offer low-income discounts to customers in need. In 2022, WES implemented the new federal Low Income Household Water Assistance Program to provide additional bill payment assistance.

Since the late 1960s, WES has been committed to protecting public health and supporting the vitality of our communities, natural environment, and economy.

The Clackamas County Board of Commissioners, in its capacity as the District’s Board of Directors, serves as the governing body of WES. The Board receives recommendations from the WES Advisory Committee on a variety of key initiatives. The WES Advisory Committee includes ratepayers, environmental representatives, business owners, members of the development community, and elected officials from the cities we serve. Members have experience in wastewater management, watershed health and restoration, economic development, and surface water. The committee provides input and makes recommendations to WES and the Board of Directors.

Board of Directors

Tootie Smith, *Chair*

Paul Savas, *Board Member*

Martha Schrader, *Board Member*

Mark Shull, *Board Member*

Ben West, *Board Member*

District Management

Gary Schmidt, *District Administrator*

Greg Geist, *WES Director*



AT A GLANCE



5

Water Resource
Recovery Facilities

23

Pump
Stations

7

BILLION

Gallons Cleaned
per Year



194,000

Estimated Population
Served

118

Employees



358

Miles of Sanitary Sewer Pipes



19,001

Surface Water Catch
Basins/Manholes

\$288,905,817

Budget

- WES Service Area
- WES Wastewater Treatment Facilities
- WES Stormwater Facilities
- 1 Kellogg Creek Water Resource Recovery Facility
- 2 Tri-City Water Resource Recovery Facility
- 3 Boring Wastewater Treatment Facility
- 4 Hoodland Water Resource Recovery Facility
- 5 Fischer's Forest Park Wastewater Treatment Facility
- 6 3-Creeks Natural Area
- 7 Carli Creek Stormwater Wetland
- 8 WES Administration, Red Soils Campus





Strategic Planning Considerations



Beginning in 2021 and continuing through 2023, WES conducted a series of internal and external listening sessions designed to strengthen customer and stakeholder understanding, create new clean water partnerships, improve services, and increase trust through enhanced connections. The discovery process included surveys, focus groups, interviews, and small group discussions. This highly collaborative process identified key opportunities to enhance WES' vision, mission, and core functions. It also gave us insight into how WES could build a more resilient future for our department, employees, and customers to provide the best service possible at an affordable cost.

A critical component to building a resilient future is good planning, and WES has been more focused than ever on how we will execute our obligations to the district. The evidence of our exceptional planning can be found in our Long-Range Financial Plan and Board-adopted Capital Improvement Plan (CIP). The CIP is a rolling five-year plan that identifies and prioritizes wastewater and stormwater construction projects and major equipment purchases. The plan is updated annually and provides planning-level schedules, budget estimates, and identifies funding sources for projects.

In addition, WES plans through the lens of a framework known as “Effective Utility Management” or “EUM.” A primer for water and wastewater utilities, it was developed by industry professionals based on best practices for water utilities across the nation. In 2022, WES used EUM as a tool to conduct a self-evaluation, which was used as a lens to guide its strategic planning process. This framework, based on the practice of continuous improvement, is designed to help WES more effectively manage its resources and organizational responsibilities.

Together, this helps us focus our time and resources on those areas and activities that best serve the organization's purpose. It also prioritizes our work in new ways to ensure we meet critical needs, address growing challenges and opportunities, and provide for the district's ongoing, long-term financial needs. Like other organizations, we've made reductions and tough choices. However, our good planning has provided us the guidance needed to make wise financial decisions to ensure we have the resources to fully fund necessary capital investments, build the financial capacity to obtain debt financing when needed, and keep rates for our customers affordable and predictable.



***Vision, Mission
& Focus Areas***







Vision: Where We Are Going

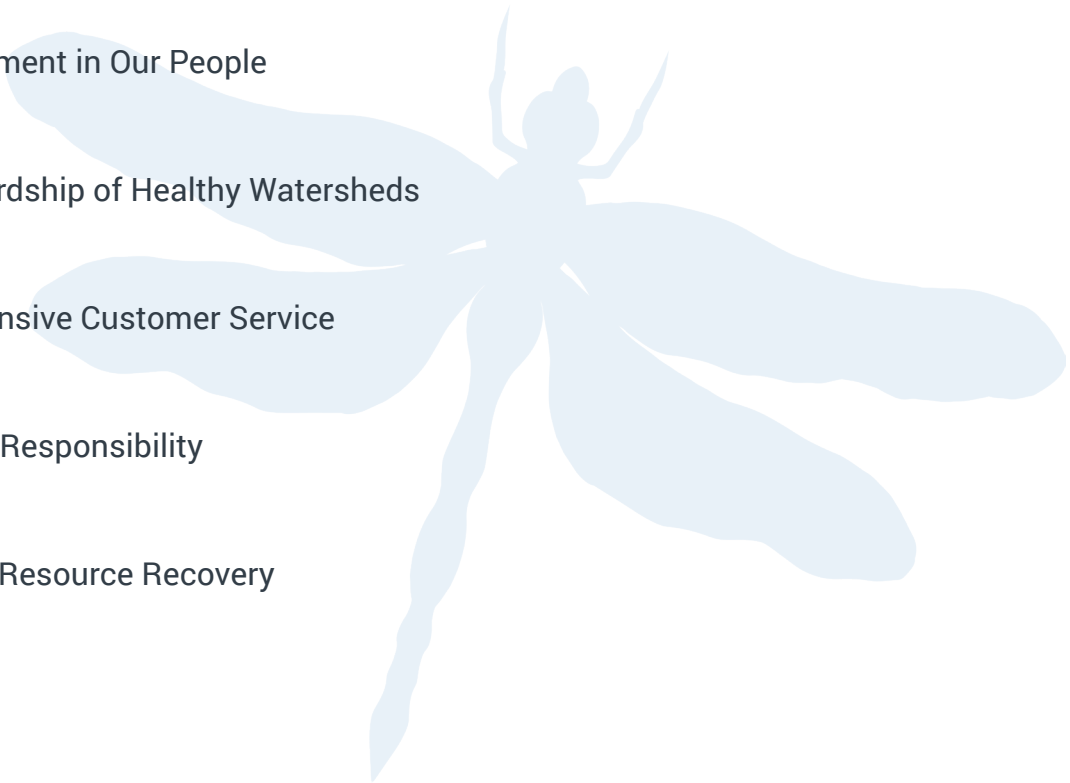
Be a collaborative partner in building a resilient clean water future where all people benefit and rivers thrive.

Mission: Why We're Here

WES produces clean water, protects water quality and recovers renewable resources. We do this by providing wastewater services, stormwater management, and environmental education. It's our job to protect public health and support the vitality of our communities, natural environment, and economy.

Our Focus Areas: What We Stand For

-  Protecting Public Health
-  Investment in Our People
-  Stewardship of Healthy Watersheds
-  Responsive Customer Service
-  Fiscal Responsibility
-  Water Resource Recovery





2025 *Strategic Framework*



This Strategic Framework provides an overview of the organization’s key initiatives and focus areas. The plan identifies the importance of each initiative in addressing critical operational challenges, as well as goals and objectives that will be implemented at all levels of our organization. Successful application of this plan will result in enhanced customer satisfaction, more efficient and resilient operations, enhanced systems and infrastructure, and a highly skilled and diverse workforce that is responsive to a growing population and changing climate, while maintaining affordable rates.

Core Strategies

Strategy 1

Workforce Planning and Development

Strategy 2

Utility Operations

Strategy 3

Asset Management

Strategy 4

Capital Planning and Delivery

Strategy 5

Financial Viability

Strategy 6

Customer Satisfaction

Strategy 7

Stakeholder and Community Engagement





Strategy 1

Workforce Planning and Development

We build an organization and work culture that attracts, retains, develops, engages, and invests in a high-performing workforce to achieve our vision, mission, and support our values.

Goals

- a) Provide the resources to proactively monitor operational needs and succession planning while attracting, retaining, developing and engaging a highly performing workforce.
- b) Invest in strategies that will attract a highly performing workforce by implementing programs unique to WES: career exploration, internships, and apprenticeships.
- c) Retain our highly performing workforce and reduce non-retirement turnover by investing in staff’s careers and honoring their contributions.
- d) Offer development opportunities that allow employees to advance both personally and professionally.
- e) Foster a culture of well-being and engagement that rewards participation.
- f) Ensure our employees’ well-being by making WES’ workplaces healthy, safe, and inclusive.

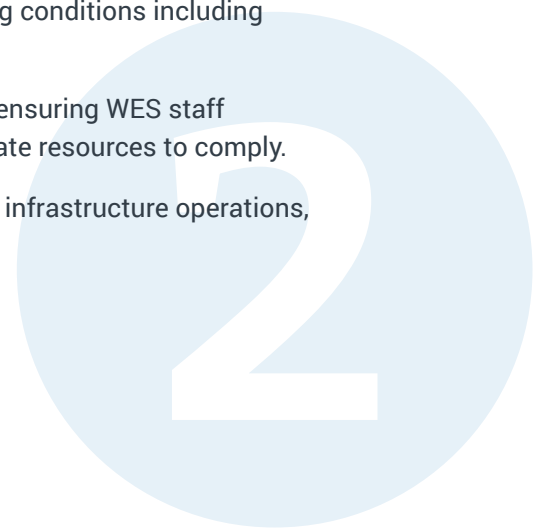
Strategy 2

Utility Operations

We effectively manage wastewater and stormwater systems to meet or surpass environmental, safety, and public health standards, recover resources and protect watersheds.

Goals

- a) Minimize the exposure of people and the environment to pollution and health hazards.
- b) Reduce the amount of pollution discharged to and from wastewater and stormwater systems and ensure compliance with WES' Rules and Regulations.
- c) Optimize operation of WES' resource recovery facilities to maximize product quality and reduce resource consumption.
- d) Ensure private and public wastewater and stormwater systems function properly, minimize property damage, nuisance disruptions, and unnecessary resource expenditures.
- e) Reuse recovered nutrients, energy, and recycled water to the extent practicable to reduce the consumption of new resources and products.
- f) Increase WES' climate readiness by reducing our carbon footprint and increasing the resiliency of our facilities.
- g) Ensure critical policies, procedures, and records are routinely updated, accessible, and safely stored.
- h) Ensure WES can continually operate under challenging conditions including extreme weather and natural disasters.
- i) Continually meet or exceed regulatory obligations by ensuring WES staff understand the requirements and are provided adequate resources to comply.
- j) Ensure programs have the data they need to optimize infrastructure operations, and to comply with regulatory permit requirements.



Strategy 3

Asset Management

We proactively invest in and maintain WES' infrastructure assets to ensure the cost-effective, sustainable delivery of reliable, high-quality, and efficient clean water services.

Goals

- a) Strategically identify and prioritize renewal and replacement projects.
- b) Maintain an accurate asset inventory that tracks the condition and history of critical infrastructure.
- c) Implement operationally efficient preventative maintenance programs for WES' assets to ensure service delivery, reliability, and regulatory compliance.
- d) Use WES information systems to optimize and automate the collection and sharing of data, record drawings, warranties, Operations and Maintenance manuals, and training documentation for reporting and operational decisions.



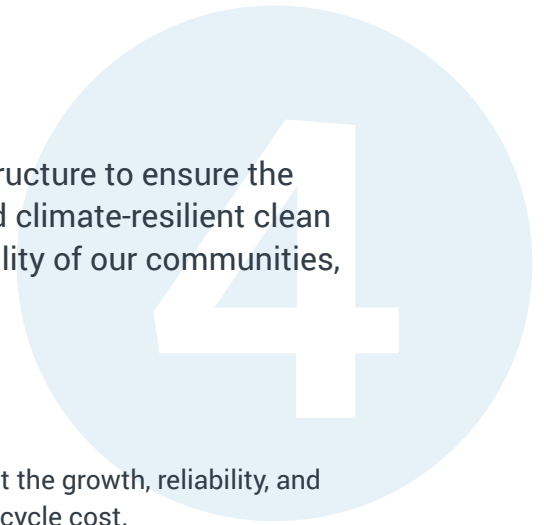
Strategy 4

Capital Planning and Delivery

We strategically plan and upgrade WES' infrastructure to ensure the sustainable delivery of reliable, high-quality, and climate-resilient clean water services that support the growth and vitality of our communities, natural environment, and economy.

Goals

- a) Strategically plan and execute capital projects to meet the growth, reliability, and regulatory needs of our service area at the lowest-life cycle cost.
- b) Reduce stormwater and groundwater infiltration entering the sanitary sewer system to prevent overflows and reduce the need to add system capacity.
- c) Update all WES Master Plans every 10 years.



Strategy 5

Financial Viability

We manage WES' financial resources to meet current and future funding needs, and to maintain fair, reasonable, and equitable rates that demonstrate fiscal responsibility.

Goals

- a) Manage WES' resources to maintain a strong and sustainable financial position.
- b) Ensure present and future funding needs are met in the most cost-effective manner.
- c) Maintain a fair and equitable rate structure that fully recovers revenue requirements and promotes affordability.
- d) Demonstrate fiscal responsibility through financial transparency.
- e) Effectively and accurately budget to meet capital investment needs, operating and maintenance expenses, and accomplish strategic objectives.

Strategy 6

Customer Satisfaction

We provide reliable, responsive customer service that aligns with our communities' values and the expressed needs of our customers.

Goals

- a) Determine customer expectations and develop plans for addressing any deficiencies in service.
- b) Improve customer understanding of and access to WES' services.
- c) Use a variety of communication tools to educate and inform customers of WES services and support.
- d) Provide timely responses that meet or exceed customer expectations.
- e) Increase awareness of, and access to, customer assistance programs that align with best practices and community values.
- f) Improve customer options for account management services.



Strategy 7

Stakeholder and Community Engagement

We are committed to building collaborative partnerships that result in a resilient clean water future where all people benefit and rivers thrive through proactive engagement, effective communication, public education, and community leadership.

Goals

- a) Establish partnerships that leverage the strength of the community to achieve shared goals and deliver common messages.
- b) Invest in community-driven solutions and cultivate a generation of diverse watershed leaders.
- c) Be responsible environmental and fiscal stewards by investing in initiatives that communicate safe, reliable, and affordable services.



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Clackamas Water Environment Services

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clackamas.us/wes



Resources

Key Guiding and Governing Documents

WES Performance Clackamas Plan

WES Capital Improvement Plan

WES Long-Range Financial Plan

*Effective Utility Management: A Primer for
Water and Wastewater Utilities*

Strategic Plan Workbook



“At WES, we all serve different functions, but we fit together to solve the clean water puzzle.”

– WES Director, Greg Geist