

HATFIELD RESIDENT FELLOWSHIP PROJECT BRIEF

Joint Utility Affordability Framework

Project Dates: September/2023 – March/2024

PROJECT GOALS

Develop a **Joint Utility Affordability Framework** in conjunction with the Portland Water Bureau and the Portland Bureau of Environmental Services.

Produce an **Annual Joint Utility Affordability Report FY2022-23**, that provides an overview of all affordability resources provided by PWB and BES.

Conduct an **environmental scan**, review **utility best practices**, and **academic literature review** to contextualize PWB and BES' actions within the current discourse on utility affordability.

Examine guiding frameworks of PWB and BES and explore opportunities for **improved collaboration** or alignment, and **explore connections/opportunities** for coordination within the City.

CHALLENGES

The discourse on utility affordability is **disparate** and **disconnected**, with **no clear consensus** on an adequate affordability threshold.

Nebulous consensus on affordability thresholds creates **clarity concerns** for **strategic planning** which translate to **unclear expectations, goals, and operationalizable workplans**.

Unclear goals impede **collaboration** between BES and PWB, worsened by a confluence of factors – **COVID19 pandemic, macroeconomic pressures, Portland charter reform, reorganization** across bureaus, power structures and **internal and elected—bureaucrat** dynamics.

Data on affordability programs are **heavily siloed**; **concentrated relational networks** produce **informational asymmetries** that make taking a **systems view** across bureaus **opaque**.

STRATEGY

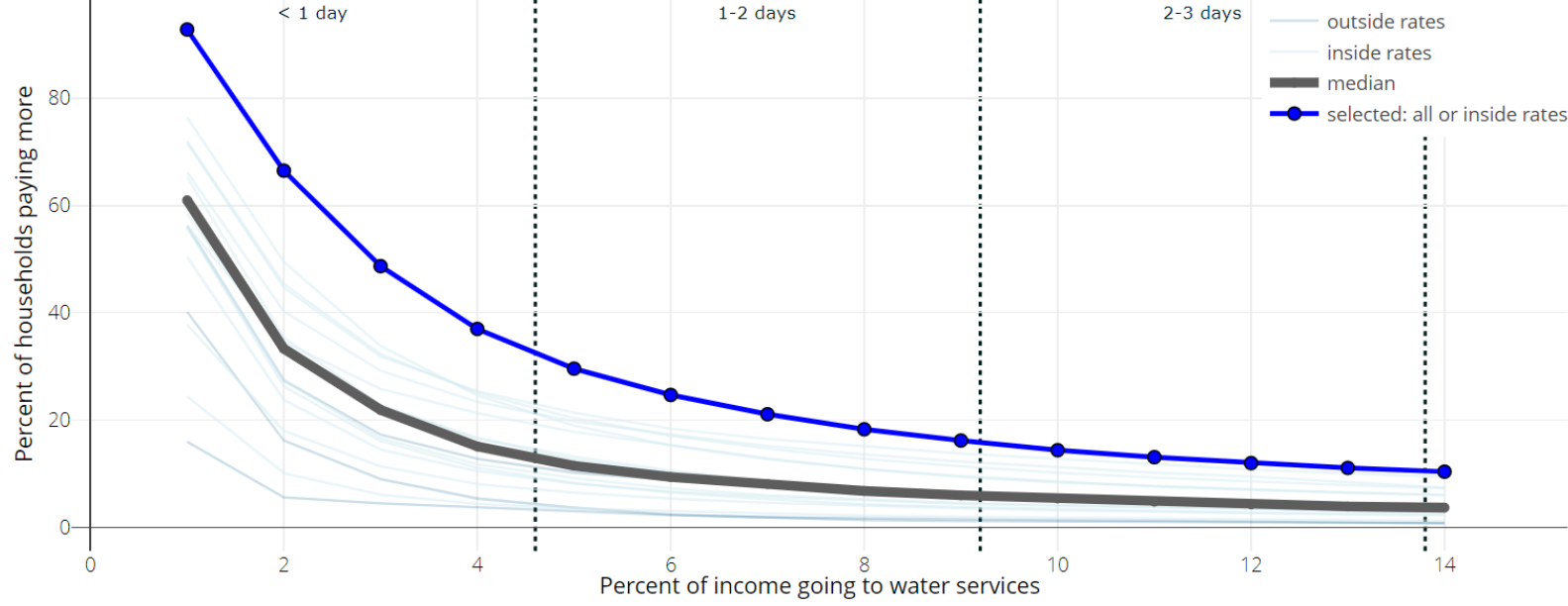
1. **INFORM** – Begin with review precedent discourse. Begin charting out “core” affordability resources provided across both bureaus.
2. **INVESTIGATE** – Extensive in-depth qualitative interviews with key personnel at BES, PWB, PBOT, BPS, BDS, and PHB (N = 60).
3. **CONNECT** – Probe on processes and programs using INFORM. Find feedback mechanisms across bureaus.
4. **CONTRAST** – Overlay BES and PWB approaches, identify gaps in guiding frameworks and corroborate through INVESTIGATE.
5. **DISTILL** – Combine findings into a digestible narrative and present final recommendations.

RESULTS [FORTHCOMING]

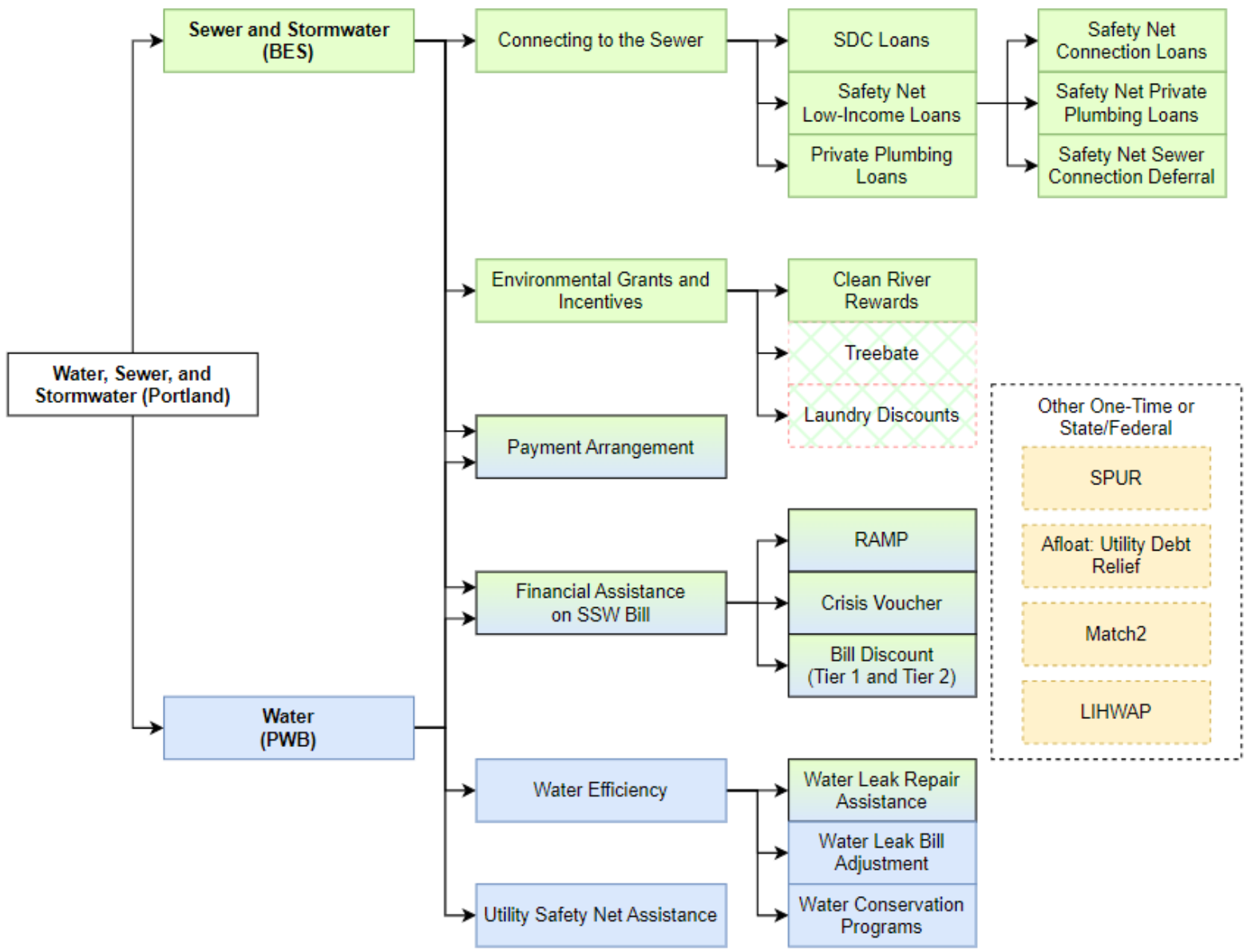
- **Joint Annual Utility Affordability Report FY2022-23**
- **Presentations and report** on recommendations for affordability framework, joint workplan, collaboration, and affordability (metrics) goals.

TAKE-AWAYS

- **Collaboration is not coordination** – harder under long-standing **cultures**, conflicting organizational **structures**, and depending on the emergence of **self-organizing collaborative teams** across bureaus.
- **Politics** and **public perception** in **glacial institutions** force **band-aid solutions** and **shortsighted program design**.
- Attention to **language, processes, and structure** are crucial, as they **restrict solutions considered**.



Source: Duke Affordability Dashboard



Source: Joint Annual Utility Affordability Report FY2022-23