

# PBOT-BES Coordination Charter

## Introduction

Within City of Portland right of way, PBOT has primary responsibility for the right-of-way and the transportation system. BES has primary responsibility for the City's stormwater conveyance and management system. Both bureaus have respective authority during the development review and permitting process to ensure that public and private infrastructure meets current standards and future needs. Both bureaus invest in operations and maintenance of existing assets in addition to investing in new assets that reduce risk to citizens, ratepayers, and the environment.

As stormwater conveyance and management facilities became more visible in the right-of-way, BES and PBOT committed to coordinating around the shared use of this space. The Stormwater Advisory Team (SWAT) and the Greenstreets Leadership Team were the first interbureau efforts to support green streets implementation and lasted for 10 years. With the retirement of the SWAT, both BES and PBOT agreed to coordinate on re-assessing priorities to support more comprehensive program and project implementation. The purpose of this effort is to increase efficiency and effectiveness in supporting and implementing both bureau's priorities while building lasting and improved working relationships across both bureaus.

High priority coordination issues were identified through three joint BES and PBOT meetings. Issues that were categorized as needing near to mid-term resolution are called out for direct resource allocation. Each issue will be addressed by focused work teams over the next 12-18 months with the goal of having new or updated policies and technical standards in the next Stormwater Management Manual (SWMM) or internal standard operating procedures/policies.

## Purpose

The primary purpose of this Coordination Charter is to support resolution of the high-priority stormwater issues identified by both BES and PBOT. It proposes a 3 tiered structure where Focused Work Teams will be assigned issues to work through to resolution. The Coordination Committee will review and provide feedback on work plans, identify barriers and resolve conflicts where possible. As necessary, larger policy issues or conflicts will be brought to the Leadership Committee as appropriate. The outcome of this work will be collaborative and accountable working relationships between the two bureaus that result in improved and integrated transportation and stormwater systems solutions.

## Context

Stormwater system planning, Street by Street, and individual development, CIP and maintenance projects have shown the strong linkage between transportation systems and stormwater systems. Service improvements to either system cannot be implemented without affecting the other. Both bureaus recognize that new procedures, policies, and standards are needed to cost effectively improve service to our customers.

## Success Indicators

This coordination effort can be measured through resolution of the selected high priority issues that are acceptable to the Leadership Committee.

## Roles and Responsibilities

Each Focused Work Team will have an assigned leader that is responsible for providing general project management throughout the established life of the team. The team lead will be responsible for developing a team work plan, producing deliverables, managing conflict resolution, and bringing the work team to a close. Leads should also ensure active participation from both bureau's development review and capital improvement programs. Participation or review from other work groups, such as maintenance, construction or other bureaus will be issue specific. Participants are expected to be representative for their respective programs and work groups and act as a two-way conduit for information sharing. Teams will likely meet at least monthly, and the leads will report monthly progress to the Coordination Team.

The Coordination Team will meet every two months to ensure progress on deliverables and will be responsible for taking improvements to technical standards to the Inter-Bureau Team (IBT) for final review following internal bureau approval. The Coordination Team will review focused work team plans and ensure that teams have appropriate representation from both bureaus and other pertinent City staff. The Coordination Team will also act as the primary point of contact for conflict resolution. The Coordination Team Chair will send meeting invites and develop draft agendas.

The Leadership Team will meet twice-yearly to receive updates from the Coordination Committee, including any suggested improvements for staff procedures and policies. The Coordination and Leadership Teams will jointly re-assess priorities.

Meeting times and frequencies will be adjusted as necessary and anyone can add additional items to the issue list for consideration.

## Operating Guidelines

All teams will have staff representation from both bureaus, each of which has its own cultures, sub-cultures, practices, and conventions. The guidelines below offer a consistent way for staff to interact and conduct business and can be refined over time.

*Communication:* Making improvements to existing policies, processes and standards or developing new policies, processes or standards will require feedback and interaction with internal staff and stakeholders. Committee and Team members should frequently interact with their respective stakeholders and team members to request feedback. The Coordination Team has the added responsibility to communicate internally to keep each other informed and aware of changes and updates to bureau staffing, priorities, or external activities that may impact the work.

*Documentation:* Working documents will be shared through email. Draft documents available for wider review and final documents will be put on the BES website on a dedicated location until superseded. Policies and standards related to the Stormwater Management Manual

(SWMM) will be incorporated into the next SWMM revision, which will then be the official adopted version.

*Decision Making:* Ideally, consensus occurs at the lowest possible level. If consensus can be reached within the focused work teams about how to resolve an issue, then that proposal will be brought to the Coordination Committee for approval prior to being brought to the Leadership Team for approval. If consensus cannot be reached or a variety of options are developed, then those will be brought to the Coordination Committee. The Coordination Committee will work to refine or frame the decisions before bringing a recommendation to the Leadership Committee. The IBT will provide direction regarding technical standards for work in the right-of-way, and will involve the bureau Chief Engineers for the final decisions as needed. The PBOT-BES Leadership Team will be the final decision making body for policy and procedural standards.

*Change Management:* Primary sources of change will include schedule and staffing. Changes should be identified as early as possible and a plan made to mitigate any risks. Proposed changes to scope or staffing must be approved by the Coordination Committee.

## Endorsement

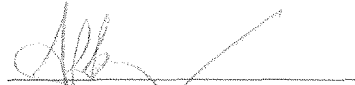
As members of the Coordination Committee, we have read and agree with the contents of this charter. We will work to provide guidance and direction to ensure that this effort has the necessary environment to be successful.



Amber Clayton



Elisabeth Raese-Cadigan




Alex Bejarano



Dan Layden



Guy Alvis



Michael Magee

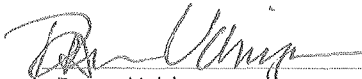


Bill Owen



Lola Gailey

As members of the Leadership Committee, we have read and agree with the contents of this charter. We will work to provide guidance and direction to ensure that this effort has the necessary environment to be successful.



Dawn Uchiyama



Bill Ryan



Steve Townsen



Sue Williams



Christine Leon



Scott Gibson



Art Pearce



Gary Irwin



Suzanne Kahn

Communication to City Council regarding the PBOT-BES Coordination Charter  
Marianne Fitzgerald, Portland City Council meeting, May 13, 2015

I wanted to commend the Portland Bureaus of Transportation and Environmental Services for signing this historic "Coordination Charter" on September 17, 2014. As Commissioners in Charge of Bureaus, each City Council member needs to show "top management support" to reinforce the outcomes anticipated in this Charter.

The PBOT-BES Coordination Committee and Leadership Committee have committed to regular check-ins. This is especially important because of the need for potential changes in resources and scheduling to accomplish these outcomes, and I hope you will be involved.

This type of Charter creates a win-win situation for both bureaus and residents that rely on the infrastructure improvements to improve livability in our neighborhoods. You'll note that the success indicator is resolution of selected high priority issues. This Charter can be a pilot for all Bureaus to address issues that need inter-bureau coordination that we residents often experience in our neighborhoods.

In SW Portland, there are huge needs to improve both the stormwater infrastructure and the transportation infrastructure, but the cost is too often too high to be acceptable to decision-makers. Using examples like the need to build sidewalks and bike lanes along SW Capitol Highway between Multnomah and Taylors Ferry Road--an area that also has severe stormwater management issues--we hope that the two bureaus will work with residents on alternative designs, and that both bureaus will contribute resources, to resolve the issues in a way that benefits the neighborhood livability.

I have personally experienced how hard it can be for multiple bureaus or agencies to sustain these coordination efforts, and know they can languish without the support of top management. I urge you to check in with the Leadership Team at least twice-yearly to see how it is working and how you can help contribute to the Charter's success.

Thank you for this opportunity to commend PBOT and BES in support of the PBOT-BES Coordination Charter.

Sincerely,  
Marianne Fitzgerald  
10537 SW 64<sup>th</sup> Drive, Portland 97219

## Moore-Love, Karla

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**From:** Marianne Fitzgerald <fitzgerald.marianne@gmail.com>  
**Sent:** Thursday, March 12, 2015 10:49 AM  
**To:** Moore-Love, Karla  
**Subject:** Communications before City Council

I would like to address City Council members regarding the PBOT-BES Coordination Charter at the earliest opportunity for "Communications". I'm very supportive of this Charter and would like to publicly express my thanks to the Commissioners in Charge.

Please let me know if you have any questions or need further information. And please let me know if it will be scheduled on March 18 or a later date.

Thank you,  
Marianne Fitzgerald  
10537 SW 64th Drive  
Portland 97219  
(503) 246-1847

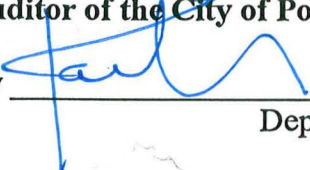
Request of Marianne Fitzgerald to address Council regarding Bureau of  
Transportation-Bureau of Environmental, Coordination Charter (Communication)  
Services

MAY 13 2015

**PLACED ON FILE**

Filed MAY 08 2015

**MARY HULL CABALLERO**  
Auditor of the City of Portland

By  Deputy

COMMISSIONERS VOTED AS FOLLOWS:		
	YEAS	NAYS
1. Fritz		
2. Fish		
3. Saltzman		
4. Novick		
Hales		