



City of Tacoma

# Performance Evaluation

Jackie Flowers

Performance Period: August, 2019 to July, 2020

Evaluators: Tacoma Public Utility Board—Karen Larkin, Bryan Flint, Mark Patterson, Christine Cooley, Carlos Watson

Date:

## Mission, Values, and City Strategic Goals

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### Our Mission

Tacoma Public Utilities provides services that are vital to our quality of life.

### Our Values

- **Serving our customers**
- **Respecting people**
- **Caring for our community and the environment**
- **Achieving excellence**
- **Operating safely**

## Tacoma 2025 Goals

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### Livability

Tacoma residents have opportunities and amenities such as connected neighborhoods, accessible and efficient transportation options, and vibrant arts and culture while maintaining affordability.



### Economy & Workforce

Tacoma Residents can find livable wage jobs in key industry areas. Tacoma will be place of choice for employers, professionals, and new graduates.



### Education

Tacoma leads the region in education for youth and adults by producing more graduates from high school and college, linking residents to employment in the region, and investing in lifelong learning opportunities.



### Civic Engagement

Tacoma residents are engaged participants in making Tacoma a well-run city. Elected and volunteer leadership of the city reflects the diversity of the city and residents fully participate in community decision making.



### Equity & Accessibility

All residents are treated equitably and have access to services, facilities and financial stability.



### Government Performance

In addition to the community goals articulated by the vision, it is clear that citizens wanted a government that works for them – one that is efficient, fiscally responsible, and effective.

## 2019/2020 Public Utility Board Strategic Direction

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### Approved

#### SD1: Equity & Inclusion

TPU is committed to achieving equity and inclusion in its workforce, serve territory, policy decision making and community/stakeholder engagement.

#### SD2: Financial Sustainability

TPU will secure its commitment to provide safe and reliable power, water, and rail services over the long term by maintaining sustainable budget, financial, and asset management practices.

#### SD3: Rates

TPU rates for power, water, and retail services play an important role in securing a strong economy, establishing equity among customers, and producing revenue sufficient to provide safe, reliable, and environmentally-sensitive utilities services. TPU strives to ensure rates will be adequate, fair, just, and reasonable.

#### SD4: Stakeholder Engagement

TPU is committed to proactive engagement and open dialogue with customers and other stakeholders to understand their needs and improve service that informs decision-making while enhancing community understanding of TPU's operations, programs, and services.

### Under development

#### SD5: Environmental Leadership

TPU is committed to being stewards of the region's bountiful natural resources, and a leader in the preservation, protection, and restoration of those resources while maintaining our excellent delivery of services. It is clear that in order to ensure we fulfill our operational duties into the future, we must balance our resource usage with the health of our environment.

#### SD6: Innovation

TPU faces complex challenges including aging infrastructure, shifting workforce dynamics, uncertain sources of supply, changing regulatory requirements, dynamically changing markets and rising customer expectations. TPU is committed to fostering a culture of innovation to meet these challenges today and into the future. Innovation refers to fresh thinking that creates value for customers, including:

- Improved processes, policies and ways of doing business
- New or enhanced products and services
- New technologies and infrastructure

An innovative culture will enable an environment of creativity, experimentation and incubation to achieve new approaches to serve our customers, manage assets, finance investments and realize superior utility performance with the added benefit of enhancing sustainability.

#### SD7: Reliability and Resiliency

#### SD8: Telecom

#### SD9: Economic Development/Undergrounding

#### SD10: Government Relations

#### SD11: Decarbonization/Electric Vehicles

#### SD12: Employee Relations

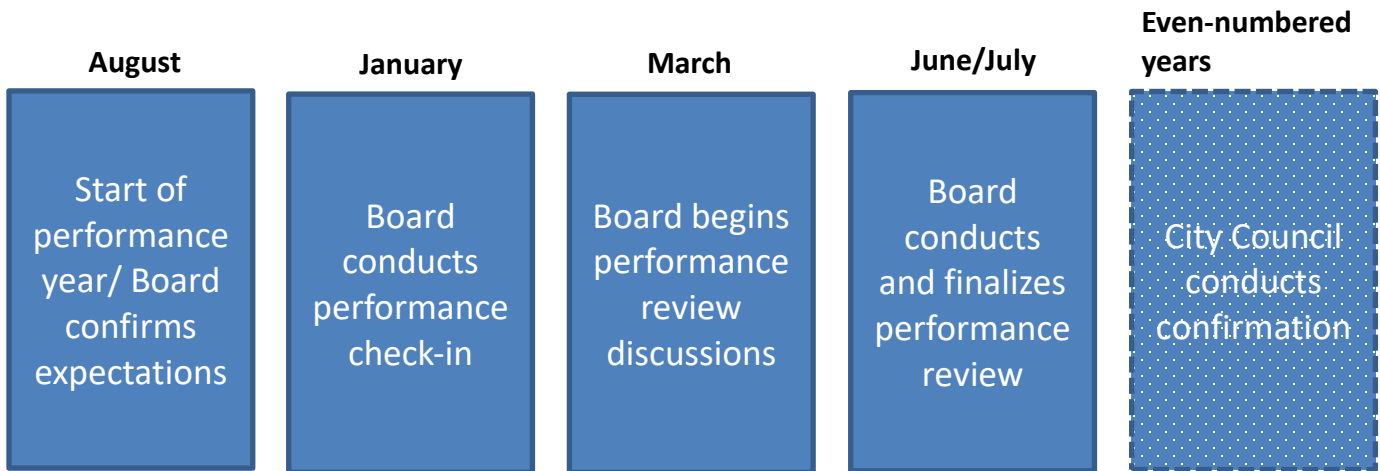
#### SD13: Customer Service

#### SD14: Resource Planning

## Performance Management Process

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Performance Year: August through July



## Ratings Definitions

**Exceptional Performance:** Demonstrates particularly excellent sustained performance of such high quality that it results in meeting organizational goals that would not otherwise have been achieved. Exerts a significant positive influence toward organizational growth. Demonstrates the performance characteristics outlined in the "Exceeds Expectations" and "Effective" categories.

**Exceeds Expectations:** Demonstrates unusually good performance that exceeds expectations in critical areas. Exhibits sustained support of organizational goals. Improves the quality and/or cost effectiveness of management practices, operating procedures, task assignments and/or program activities. Effectively handles difficult and unpredicted and/or unprecedented problems.

**Achieves Expectations:** Demonstrates good, sound performance that meets organizational goals. Completes critical activities in an effective manner. Applies technical skills and organizational knowledge to successfully carry out assigned duties. Plans and performs work according to organizational priorities and schedules. Communicates clearly and effectively.

**Requires Development:** Performance is deficient in one or more key areas and will require additional training or assistance to fully achieve expectations.

**Unsatisfactory:** Shows a lack of awareness of or regard for policy implications or assignments. Circumvents established procedures, resulting in unnecessary expenditure of time or resources. Reluctance to accept responsibility. Performance failed to meet expectations in essential areas of responsibility and/or critical goals were not met. Work is behind schedule and/or of poor quality.

Tacoma 2025 Focus Area: Equity and Accessibility  
Public Utility Board Priority: *SD1 Equity and Inclusion*



Strategic Direction	Strategies	Comments	Performance
TPU is committed to achieving equity and inclusion in its workforce, serve territory, policy decision making and community/stakeholder engagement.	1. Establish an organization culture that embraces diversity, equity, and inclusion through training and employee engagement.		
	2. Lead the organization through the change process resulting from the Workforce Equity Study.		

## Tacoma 2025 Focus Area: Government Performance

### Public Utility Board Priority: *SD2 Financial Sustainability; SD 3 Rates*



Strategic Direction	Strategies	Comments	Performance
<p>SD2: Financial Sustainability TPU will secure its commitment to provide safe and reliable power, water, and rail services over the long term by maintaining sustainable budget, financial, and asset management practices.</p> <p>SD3: Rates TPU rates for power, water, and retail services play an important role in securing a strong economy, establishing equity among customers, and producing revenue sufficient to provide safe, reliable, and environmentally-sensitive utilities services. TPU strives to ensure rates will be adequate, fair, just, and reasonable.</p>	1. Prepare a sustainable biennium budget proposal using a collaborative outreach process that includes the Board, the Council, Franchise Cities, and other key stakeholders by January 1, 2021.		
	2. Identify strategies to keep rates low and prioritize initiatives to pursue and track success by December 31, 2020.		
	3. Maintain competitive rates for utility services.		

# Tacoma 2025 Focus Area: Civic Engagement

## Public Utility Board Priority: SD 4 Stakeholder Engagement



Strategic Direction	Strategies	Comments	Performance
TPU is committed to proactive engagement and open dialogue with customers and other stakeholders to understand their needs and improve service that informs decision-making while enhancing community understanding of TPU's operations, programs, and services.	1. Identify data sets related to implementation of the stakeholder engagement strategic directive. Develop data collection and tracking mechanisms to support outreach efforts and measure effectiveness by December 31, 2020.		
	2. Report at least biannually to the Public Utility Board on stakeholder and customer engagement efforts.		



# Tacoma 2025 Focus Area: Civic Engagement

## Public Utility Board Priority: *SD 5 Environmental Leadership*



Strategic Direction	Strategies	Comments	Performance
TPU is committed to being stewards of the region's bountiful natural resources, and a leader in the preservation, protection, and restoration of those resources while maintaining our excellent delivery of services. It is clear that in order to ensure we fulfill our operational duties into the future, we must balance our resource usage with the health of our environment.	1. Identify opportunities to participate in local (City of Tacoma and franchise city) events to raise awareness about energy and water conservation programs by July 1, 2019.		
	2. Develop and implement community outreach plan related to Environmental Action Plan initiatives completed by December 31, 2020.		
	3. In coordination with the City Manager in 2020, establish a training plan for utility leaders regarding climate science and equity awareness related to how climate change impacts the delivery of services to the public and capital improvements.		

## Tacoma 2025 Focus Area: Government Performance

### Public Utility Board Priority: SD 6 Innovation



Strategic Direction	Strategies	Comments	Performance
TPU is committed to fostering a culture of innovation to meet these challenges today and into the future. Innovation refers to fresh thinking that creates value for customers, including: <ul style="list-style-type: none"> <li>Improved processes, policies and ways of doing business</li> <li>New or enhanced products and services</li> <li>New technologies and infrastructure</li> </ul>	1. Foster a spirit of innovation that values our customer and enhances our operational excellence. Develop maturity model and roadmap for innovation by December 31, 2020.		
	2. Champion AMI project including plan and initiate customer outreach, complete integration and testing, and execute AMI initial deployment area (100 electric and 100 water meters) by December 31, 2020.		
	3. Lead steps to advance development of customer portal (initiate contract for Customer Engagement Portal vendor) and identify priority opportunities to transform customer experience. Publish customer engagement portal by December 31, 2020.		
	4. Oversee development of data governance and TPU work practices to enhance data centered decision-making in TPU operating divisions.		
	5. Identify priority strategies from the Digital Transformation Roadmap for implementation with particular focus on customer facing initiatives by December 31, 2019. Publish distribution automation and geospatial program roadmaps by December 31, 2020.		

## Tacoma 2025 Focus Area: Economy and Workforce

### Public Utility Board Priority: SD 7 *Reliability and Resiliency*



Strategic Direction	Strategies	Comments	Performance
TBD	1. Establish initiatives that will enhance comprehensive TPU emergency response capabilities by December 31, 2019.		
	2. Identify strategies to build workforce “K to career” talent pipeline, including outreach, internships, and veteran’s programs. Initiate action to implement two strategies by December 31, 2020.		

Tacoma 2025 Focus Area: Economy and Workforce  
Public Utility Board Priority: SD 8 Telecom



Strategic Direction	Strategies	Comments	Performance
TBD	<div><div>1. Execute the strategic direction for Click Network!</div><div><div>• Implement strategies to maintain customer base during the transition</div><div>• Develop a governance structure, including a strategy to monitor and report the status of the public-private partnership</div><div>• Manage workforce transition</div></div></div>		

## Tacoma 2025 Focus Area: Economy and Workforce

Public Utility Board Priority: *SD9 Economic Development/Undergrounding*

Strategic Direction	Strategies	Comments	Performance
TBD	1. Examine policy and procedure to identify potential modifications to reduce barriers to economic development and redevelopment opportunities important to the City of Tacoma and franchise cities by December 31, 2019.		
	2. Develop and assess effectiveness of pilot program related to undergrounding distribution lines by June 30, 2020.		
	3. Support Public Works Department in review of policies associated with utility participation in infrastructure relocation projects.		

## Tacoma 2025 Focus Area: Government Performance

### Public Utility Board Priority: *SD10 Government Relations*



Strategic Direction	Strategies	Comments	Performance
TBD	1. Continue to build and enhance positive working and collaborative relationship with the Public Utility Board.		
	2. Map out development process for Principles of Board Governance in key areas and identify existing policies and/or resolutions germane to the process by July 1, 2019.		
	3. Identify strategic areas of focus to support the City's Vision 2025 by January 1, 2019.		
	4. Work with City Manager to ensure efficient and effective utilization of shared and/or complementary City resources and services in accordance with Prop 3.		
	5. Continue to build and enhance the positive working and collaborative relationship with the Mayor, City Council Members, and the City Manager.		

# Tacoma 2025 Focus Area: Livability

## Public Utility Board Priority: *SD17 Decarbonization/Electric Vehicles*



Strategic Direction	Strategies	Comments	Performance
TBD	1. Identify three key transportation decarbonization strategies by December 31, 2019.		
	2. Finalize the Transportation Electrification Strategic Plan following stakeholder engagement consistent with SD 4. Target PUB adoption by May 31, 2020.		

## Tacoma 2025 Focus Area: Government Performance

### Public Utility Board Priority: *SD12 Employee Relations*



Strategic Direction	Strategies	Comments	Performance
TBD	1. Establish a strong safety culture in all aspects of the organization through increased emphasis on safety, enhanced training, and standard metrics.		
	2. Champion the organization change process necessary to implement the Compensation and Classification study recommendations.		
	3. Implement strategies to continue to address the key findings from the employee survey.		
	4. Analyze organizational structure around organizational efficiency and span of control. Determine where opportunities exist and develop a plan to address priority items by December 31, 2020.		



## Tacoma 2025 Focus Area: Government Performance

### Public Utility Board Priority: *SD13 Customer Service*



Strategic Direction	Strategies	Comments	Performance
TBD	1. Increase BCAP to either \$1,000,000 in bill assistance or 2,000 participating households by December 31, 2020.		
	2. Raise senior leader awareness of customer circumstance with respect to income constraints by conducting a poverty simulator by October 31, 2019, and implementing key learnings.		

## Tacoma 2025 Focus Area: Economy & Workforce

### Public Utility Board Priority: *SD14 Resource Planning*



Strategic Direction	Strategies	Comments	Performance
TBD	1. Establish a process that identifies key long-term contractual obligations (ex. Bonneville Power), identifies list of preferred product offerings, and ensures progress towards developing an evaluation process for renewal options by December 31, 2020.		
	2. Complete Integrated Resource Planning process for 2020-2025 period including stakeholder engagement consistent with SD 4. Target PUB adoption by August 31, 2020.		

## TPU Director Competencies

### Ratings Definitions

- Role Model** Serves as an example of the values, attributes and behaviors associated with the competency. May be sought out as a coach by others and may contribute valuable ideas on how the organization can improve on specific behaviors.
- Fully Competent** Consistently demonstrates the values, attributes and behaviors. Requires coaching infrequently and may occasionally coach others.
- Needs Improvement** Requires coaching on a frequent basis to correct behaviors. Would benefit from additional focus on specific behaviors.

Competency	Definition	Performance
<b>Business insight</b>	Applying knowledge of business and the marketplace to advance the organization's goals	
<b>Cultivates innovation</b>	Creating new and better ways for the organization to be successful	
<b>Strategic mindset</b>	Seeing ahead to future possibilities and translating them into breakthrough strategies	
<b>Collaborates</b>	Building partnerships and working collaboratively with others to meet shared objectives	
<b>Manages conflict</b>	Handling conflict situations effectively, with a minimum of noise	
<b>Interpersonal savvy</b>	Relating openly and comfortably with diverse groups of people	
<b>Communicates effectively</b>	Developing and delivering multi-mode communications that convey a clear understanding of the unique needs of different audiences	
<b>Drives vision and purpose</b>	Painting a compelling picture of the vision and strategy that motivates others to action	
<b>Courage</b>	Stepping up to address difficult issues, saying what needs to be said	
<b>Instills trust</b>	Gaining the confidence and trust of others through honesty, integrity, and authenticity	

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### Board Rating (Leadership Competencies)

(Check one)

- ☐ Exceptional performance
 ☐ Exceeds expectations
 ☐ Achieves expectations
 ☐ Requires development
 ☐ Unsatisfactory

## Overall Rating and Comments

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### Overall Rating

☐ Exceptional  
performance

☐ Exceeds  
expectations

☐ Achieves  
expectations

☐ Requires  
development

☐ Unsatisfactory

### Comments