

6-12-2024

Developing A Social Equity Action Plan: A Pathway Towards Achieving Water Equity in Oregon

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Recommended Citation

Zaman, Anis and Hathhorn, Wade (2024) "Developing A Social Equity Action Plan: A Pathway Towards Achieving Water Equity in Oregon," *Hatfield Graduate Journal of Public Affairs*: Vol. 8: Iss. 1, Article 8. <https://doi.org/10.15760/hgjpa.2024.8.1.8>

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Introduction

The Sunrise Water Authority's fundamental mission is "*To provide a safe, reliable supply of water from an efficient, customer-focused organization.*" While this seems like a rather straightforward objective, it implies we are referencing *all customers*. But who are our customers? And are cultural and racial differences within those customers that tend to limit their ability to receive "fair" and "equitable" service based on our existing operational practices? Like many public utilities, Sunrise has largely been organized and run under a *homogenous* set of rules and regulations. These rules are presumed to provide equitable service to all customers. Yet, in reality, not all customers are the same – and hence, "equity" can mean different things to different groups. Many citizens, especially people from marginalized groups, often face challenges in accessing and affording the water facilities they need. Therefore, it is imperative to understand how our customers can best access our services, how they benefit from them, and how resilient our services are in meeting community needs in challenging situations. For example, if English is the only language used to communicate with our customers, are they all receiving the same degree of service? Maybe not. The issue then becomes what an appropriate level of service is. Does it require the public utility to be *all things to all customers*? Certainly not - this is impractical. The answer, however, requires a thorough understanding of who those customers are and a desire to create equitable access and benefits to all – especially among those potentially marginalized or underrepresented elements within that customer base. Hence, there is a need to develop equity-centered water supply policies and regulations for service delivery to communities Sunrise Water Authority proudly serves.

Background

Description of Sunrise Water Authority

The Sunrise Water Authority is a public water utility that serves drinking water to about 53,000 customers within the City of Happy Valley and surrounding areas of unincorporated Clackamas County. Sunrise was formed in 2000 through a merger of the former Mt. Scott and Damascus Water Districts, along with support from the City of Happy Valley. Unlike a traditional Oregon special district, the Authority status granted to Sunrise prevents it from being subject to annexation (or withdrawal) by a city or other special district. This feature ensures the preservation of its customer base and present and future service areas. Geographically, Sunrise covers a service area of about 22.5 square miles in the northwestern corner of Clackamas County. The county line marks the northern boundary and extends west to east from I-205 to about SE 250th Avenue, near the Town of Boring. A general map of the Sunrise service area is shown in the illustration below.

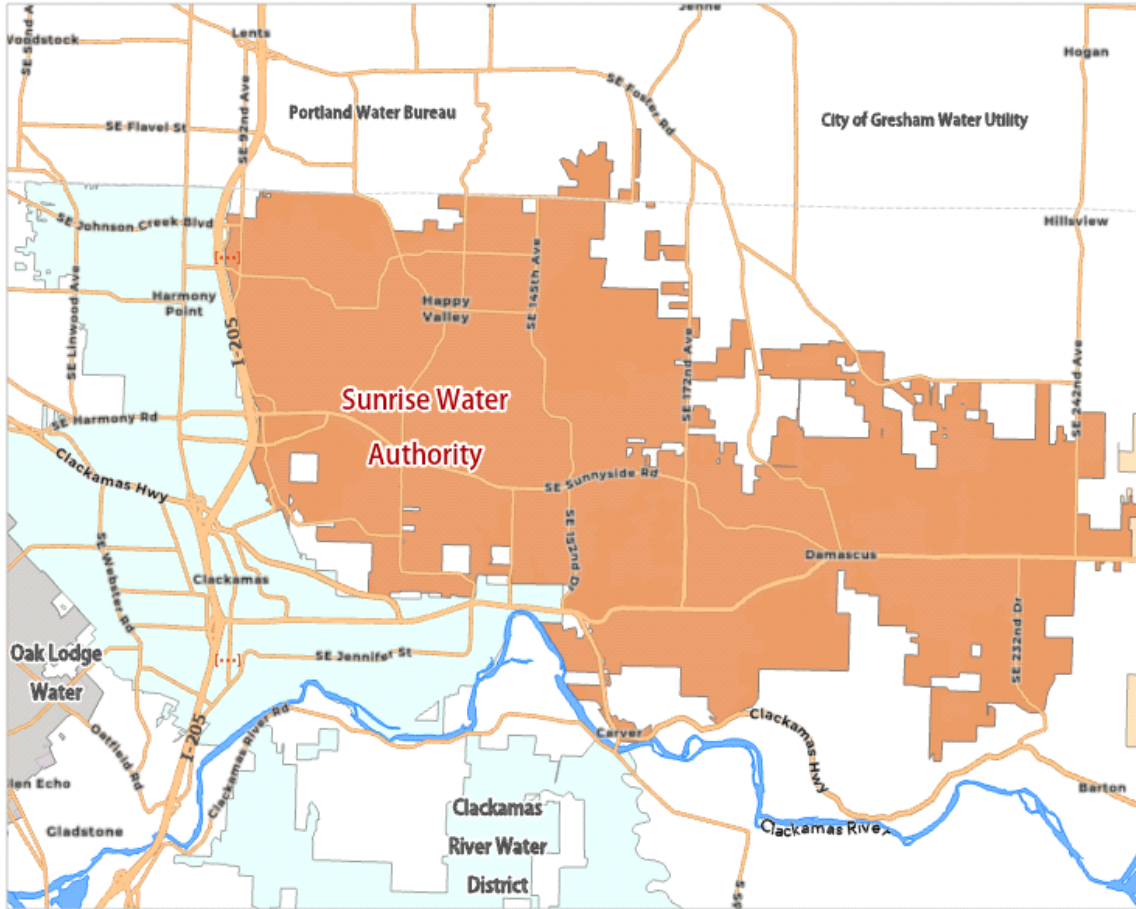


Figure 1. Sunrise Water Authority Service Map (<https://www.sunrisewater.com/>)

Basic Demographics

Basic information on the demographics of Sunrise customers was gathered from data published by the US Census Bureau and its 2021 American Community Survey. The data reported here does not exactly reflect the entire Sunrise service area but is a subset of that population based on the "Happy Valley" and "Damascus" census areas.

Table 1. Basic Demographic Data for Happy Valley and Damascus (US Census Data 2021, American Community Survey)

	Happy Valley	Damascus
Population estimated 2022	26,456	11,050
Owner-occupied housing rate	85.2%	95.1%
Persons per household	3.03	3.15
Median age	39	45
Median household income	\$131,980	\$101,574
Percent in poverty	4.0%	3.5%
High school degree or higher	95.8%	96.6%
Bachelor's degree or higher	50.0%	29.0%
With a disability, percent	3.3%	9.0%

Foreign born, percent	16.5%	9.5%
Language other than English at home	21.3%	12.3%

The population is generally affluent, with some of the highest median household incomes in the state, led by those in Happy Valley at nearly \$132,000, and poverty rates are less than 4%. The owner-occupied housing rate is also relatively high, exceeding 85% in both communities. The population is also generally educated, with those graduating high school (or beyond) exceeding 95%.

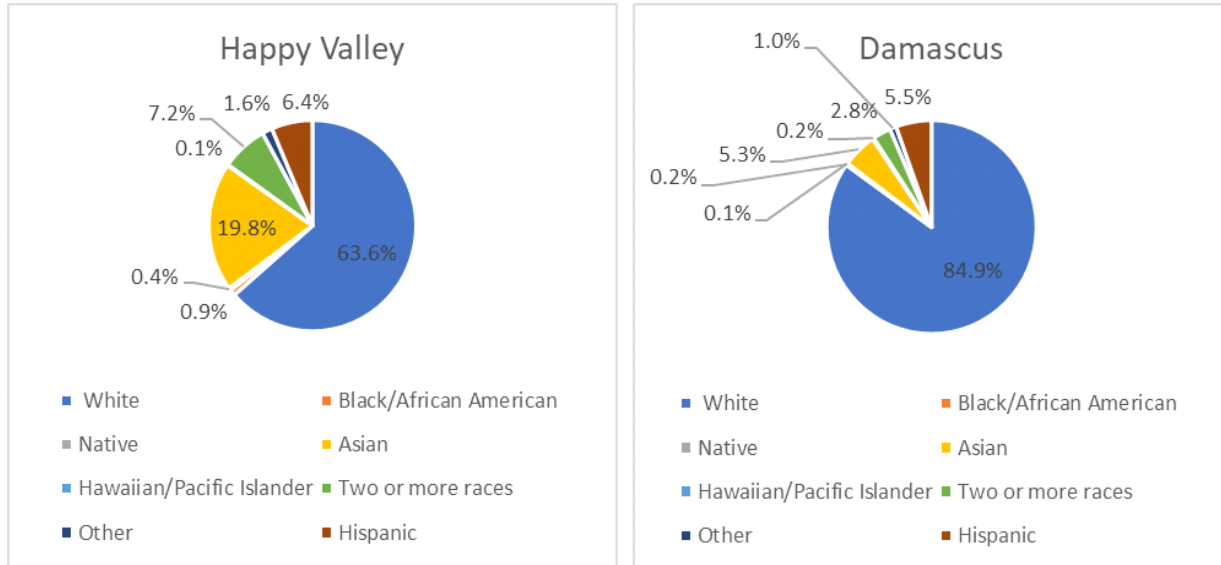


Figure 2. Race/Ethnicity Data for Happy Valley and Damascus (US Census data 2021 American Community Survey)

Furthermore, the population is predominately white (non-Hispanic), with a notable Asian presence (nearly 20% in Happy Valley). The next largest race/ethnicity is Hispanic (around 6%). It is interesting to note that the foreign-born population is as high as 16% or more in Happy Valley. Similarly, more than 20% of the households in Happy Valley do not speak English at home. Within these foreign-born figures, the majority of that population includes persons from Vietnam, Korea, China, Philippines, and Laos, as well as persons from Romania, Ukraine, Russia, Mexico, and Columbia.

Defining Social Equity in Water

What is Social Equity?

While there are many definitions of the term, the American Society for Public Administration (ASPA) Center for Social Equity offers the following:

Social equity is the fair, just, and equitable management of all institutions serving the public directly or by contract, the fair and equitable distribution of public services, the implementation of public policy, and the commitment to promote fairness, justice, and equity in the formation of public policy.

The fundamental concept of **Equality** is founded on the principle of providing similar access and resources to all people to create equitable levels of social, economic, and environmental success. However, equality formally requires everyone to start from the same place and have the same needs. This is not the case. Historically, many elements of our population have not been allowed access to the same opportunities and resources. Hence, **Social Equity** goes further to ask what type of support may be needed by different elements within a population for equity to be commonly achieved (Oregon Department of Transportation Social Equity White Paper, prepared by HDR, Inc., 2021).

In 2020, the Oregon Department of Transportation (ODOT) created an Office of Social Equity (OSE), which has worked to define equity agency-wide. ODOT's definition of social equity is from the State of Oregon Equity Framework in COVID-19 Response and Recovery, and it is also in its I-5 and I-205 Toll Project Equity Framework (2020). It reads:

Equity acknowledges that not all people, or all communities, are starting from the same place due to historic and current systems of oppression. Equity is the effort to provide different levels of support based on an individual's or group's needs in order to achieve fairness in outcomes.

Equity actionably empowers communities most impacted by systemic oppression and requires the redistribution of resources, power, and opportunity to those communities."

ODOT further defines historically excluded and underserved people as:

- People experiencing low-income or economic disadvantage
- Black, Indigenous, and People of Color (BIPOC)
- Older adults (65+) and children
- People with limited English proficiency (LEP)
- People living with a disability

Similarly, in 2017, the US Water Alliance (USWA) published a national briefing paper titled, '*An Equitable Water Future.*' The objective of this work was to examine the various challenges facing the water industry today and their impacts on vulnerable communities across the US. This report draws on research on more than 250 organizations, a variety of in-depth surveys, and discussions with more than 125 industry stakeholders, including utility leadership, government agencies, community organizations, and others.

The report offers the basic premise that "Water shapes economic growth, the environment, and the very social fabric of our communities. Ensuring that all people have access to safe, reliable, and affordable water and wastewater systems is the cornerstone of a sustainable and prosperous nation." The report goes on to cite, "*Vulnerable communities* that face various forms of *water stress* are held back from full participation in the economy, lowering productivity and competitiveness." Moreover, "Those most affected are often lower-income people, communities of color, children, and the elderly, among others." In preserving the USWA framework, acknowledgment is given to the relevant definitions offered in their report:

Introducing the Three Pillars

The US Water Alliance used their research to create a framework for advancing water equity across the US. This framework is formed on the three (3) "Pillars of Water Equity" that include:

1. Ensure all people have access to clean, safe, affordable water service.
2. Maximize the community and economic benefits of water infrastructure investment.
3. Foster community resilience in the face of a changing climate.

While the USWA framework was established to address the wide variety of water service challenges facing the US, these same principles can be translated locally to the Sunrise Water Authority as follows:

Pillar One: *Ensure all people have access to clean, safe, affordable water service.*

Issue	Strategies
Water Quality	<ul style="list-style-type: none"> • Address water quality in vulnerable communities • Ensure service levels are met in vulnerable communities
Affordability	<ul style="list-style-type: none"> • Provide adequate financial support for vulnerable customers • Maintain an affordable rate structure
Public Outreach	<ul style="list-style-type: none"> • Target public outreach to vulnerable communities • Offer access to public information in multiple languages

Pillar Two: *Maximize the community and economic benefits of water infrastructure investment.*

Issue	Strategies
Workforce Development	<ul style="list-style-type: none"> • Create an inclusive and diverse workforce • Develop a training program to attract women and minority candidates
Procurement & Contracting	<ul style="list-style-type: none"> • Increase opportunities for women and minority-owned businesses • Prioritize contracting with local providers

Pillar Three: *Foster community resilience in the face of a changing climate.*

Issue	Strategies
Planning for Resilience & Climate Change	<ul style="list-style-type: none"> • Incorporate community vulnerability assessments in preparing for emergencies and recovery. • Address climate impacts in future supply planning.

Putting Equity into Action

Water Quality & System Maintenance

Most of Sunrise's water comes from the Clackamas River, with a small amount of groundwater being added in some areas during the summer. Both sources are relatively clean by nature and hence provide high-quality drinking water throughout our system. The water from all sources consistently meets or exceeds all federal and state drinking water standards. When it comes to lead and other contaminants of concern, the issue turns to the types of materials used in the plumbing fixtures and connections within homes, apartment complexes, schools, retirement and healthcare facilities, and other areas open to the public. Studies have shown that most lead in drinking water results from water's corrosive action on home plumbing, and homes of a certain age are most susceptible. The use of lead solder and other related materials (e.g., galvanized piping) was banned from home plumbing in Oregon in 1985. Hence, homes and other buildings before this time may still pose a risk. That risk is managed by controlling the properties (i.e., pH) of the water served throughout the system.

Notwithstanding, there are several rental properties in the area, which could tend to provide housing to those less affluent. Certainly, properties of this kind built before 1985 may pose a greater risk with regard to on-premise (indoor) water quality. New federal rules now require Sunrise to identify such risks. Sunrise should include in its lead risk reduction strategy an additional search for properties where persons potentially subject to economic stress or underrepresentation might be located, such as apartment complexes, assisted living centers, rental homes, and other locations where potentially vulnerable portions of the service population may reside. Sunrise also regularly conducts various system maintenance activities, such as meter change-outs and other equipment replacements, as well as flushing along restricted service lines and other locations where "dead-end" water may occur. Sunrise should prioritize system maintenance of this type at similarly vulnerable locations as described above.

Rates and Affordability

Sunrise regularly compares its rates with those of other local water providers and continues to provide full service among the 25-30% lowest priced water providers in the region. Moreover, the industry (AWWA) standard for "affordability" is for the monthly combined residential water/wastewater bill not to exceed 3-5% of median household incomes. For Sunrise, this number is between \$350-500/month. By comparison, the average monthly bill for Sunrise customers is currently about \$50 (this excludes monthly wastewater bills); hence, the current rates charged by Sunrise are presumed to meet this general affordability standard.

Notwithstanding, there are elements within Sunrise's service population that are subject to some level of financial stress. In 2020, Sunrise began a bill assistance program, offering a \$200 annual credit to those qualifying for support under the "low-income" assistance program administered by Clackamas County (Social Services). The program provided support to about 150 households in 2022, with additional support planned for 2023. Sunrise's bill assistance program, however, is not widely publicized. Recipients are discovered as part of a person or household's independent application through County Social Services. An important improvement would be for Sunrise to openly advertise its bill assistance program through its website, billing inserts, and other forms of customer outreach.

Alternative Language Communications

The demographic data for Sunrise indicates that as many as 20% (or more) of the population may not speak English at home in some areas. Sunrise currently communicates to its customers only in English. Sunrise might improve its communication with potentially vulnerable segments of its population by considering the use of various other languages, such as Vietnamese, Korean, Chinese, Russian, and Spanish. Sunrise might also consider providing language translation services to customers wishing to speak to customer service representatives in languages other than English.

Emergency Preparedness & Disaster Recovery

The Regional Disaster Preparedness Organization (RDPO) is a collaboration of local government, non-government, and private sector stakeholders to increase local disaster resilience. The RDPO is sponsoring several important work groups, including the Community Engagement Lessons Learned (CELL) Project and the Social Vulnerability Tools (SVT) Project. The goal of these programs is to improve emergency preparedness and recovery across all elements of our population and to ensure equitable access to those potentially vulnerable groups. The CELL project also participates in the national Language & Accessibility for Alert & Warning Workgroup (LAAWW). Sunrise should consider becoming more involved in the work of the RDPO and fostering both direct and indirect support for its relevant programs. Sunrise is also a Regional Water Providers Consortium (RWPC) member. The RWPC has published an emergency preparedness toolkit that is offered in multiple languages. Sunrise should provide a link to this information on its website, Facebook page, and other media outlets.

Workforce Development

Sunrise provides high-paying, quality jobs to persons at all skill levels, starting with those who may only have a high school degree or GED. While Sunrise is supportive of its EEO and diversity efforts, it should look to further its employment opportunities for women, minorities, and persons of color. Examples might include the creation of on-the-job training programs to allow for greater entry into the water service profession. Sunrise might also consider offering scholarships targeted at supporting diverse applicants to the Water, Environment & Technology (WET) program at Clackamas Community College.

Contracting for Goods and Services

Sunrise issues millions of dollars in contracts for goods and services every year. While Sunrise currently encourages bids from minority and women-owned businesses, it does not have a formal process for providing an advantage to those firms in the bidding process. Many of the cities in the area, including Portland, Tigard, Beaverton, Hillsboro, and others, are adopting an "equity lens" with regard to procurement, workforce, and other services. Similarly, Sunrise should consider adopting specific procurement policies to broaden access to "disadvantaged" businesses and target local providers.

Improving Resilience to Climate Change

Climate change is affecting weather patterns worldwide. Sunrise is experiencing not only hotter summers but also longer periods of "drought" (no rain) in the spring and summer. This is affecting the "water availability" in the Clackamas Basin, especially during late summer and

early fall. As a result, Sunrise will face more frequent periods requiring either voluntary or even mandatory curtailment of outdoor use during these periods.

As a member of the Clackamas River Water Providers (CRWP), Sunrise participates every year in the program called, "Fish on the Run, irrigation done." This is an annual voluntary curtailment program asking customers to reduce or even eliminate outdoor use in late summer, especially after the first of September. The CRWP also offers rebates (as available) on low-flow toilet replacements, smart lawn irrigation controllers, and other water-saving devices. Sunrise may look to expand those offerings to its customers, emphasizing those within the vulnerable population.

Conclusion

This social equity action plan is developed based on the needs assessment conducted in Happy Valley City and surrounding areas of Damascus for the development of equity-centered water services. However, this action plan can also be used as a model or useful example in developing equity-centered policies for utility services. This policy change initiative by Sunrise water authority will further progress the water equity goal for greater Oregon. This policy paper can serve as a guide for the Sunrise Water Authority and other relevant institutions for planning and implementing equity policies in water service deliveries. As outlined in this paper, the implementation of an equity policy will help the Sunrise Water Authority develop a sustainable water service system that may comprehensively serve the community in more inclusive and equitable ways.