



Civic Engagement For Equitable Water Infrastructure Investment  
Community Outreach Template  
October 2023  
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## **OVERVIEW**

As part of the PolicyLink and River Network’s Civic Engagement for Equitable Water Infrastructure Investment project, Verde connected with frontline community leaders and water providers in Oregon to identify underserved communities with water infrastructure needs, barriers to addressing those needs (e.g. funding criteria, application process, community engagement), and opportunities to improve the Oregon SDWRLF criteria and outreach processes. This plan outlines our outreach approach and key research questions.

Nine water utilities were identified through media coverage of infrastructure challenges and projects in development, from Oregon’s Project Priority List and past SDWRLF annual reports, or based on existing relationships. Utilities ranged in size from small (25-500 people), medium (10-50k), and large (>50k people).

Six community-based organizations, three city managers from two different cities, and Oregon Consensus (National Policy Consensus Center based in Oregon) were interviewed in addition to water utility systems. They were identified through existing relationships, research, and recommendations.

### **Our primary goals of these engagements were to:**

1. Gain a better understanding of the awareness of State Revolving Funds (SRFs) and what benefits or barriers exist in accessing this funding.
2. Explore how Oregon water utilities are approaching community engagement and affordability in infrastructure planning.
3. Explore how community based organizations have engaged in SRFs and/or how they would like to engage.

### **Overarching project questions/goals:**

- How can community engagement (at the state and utility level) be improved so that utilities are addressing the needs of frontline communities (e.g. funding, workforce development, technical assistance, etc.) in a culturally responsive way ?
- How can Oregon SDWRLF definitions/criteria be improved so that true DACs are receiving the intended benefits of BIL?
- How can Oregon leverage the lead service line set-aside in BIL to address lingering lead problems not “owned” by utilities?



- Awareness: What is the awareness level among Oregon CBOs of local infrastructure investments and/or water providers serving their communities? Awareness of BIL funding opportunities and prioritization of disadvantaged communities?
- Engagement: How many water providers have any public involvement processes? How many have identified disadvantaged communities within their service area? How do they perceive who is disadvantaged within their service area (i.e. separate from the SDWRLF definition of DAC)? What does the engagement between state agencies and water providers look like... is there a strong support network, efforts to make improvements, robust programs for continual improvement?
- Need: Where/what are the drinking water infrastructure needs specific to frontline communities in Oregon?\* How many meet the criteria for the Oregon SDWRLF?\* How many are in the process of being addressed? How many have applied for/received funding from the SDWRLF?\* Did the funding/infrastructure improvement meet the needs of frontline communities? Should criteria promote other values like climate adaptation, hazard mitigation, source water protection?
- Experience with the program
- Barriers: What barriers do frontline communities and utilities face in accessing SRF funding and/or addressing infrastructure needs for disadvantaged communities within their service area?
- Lead: What water utilities currently have lead in their delivery system or previously removed lead service lines within their community? Would they consider applying for BIL funding to remove lead service connections on the homeowner side?



## TEMPLATES

Below is a list of templates and questions that we used to guide our conversations with utilities and community based organizations.

### **Introduction template:**

The introductions were the same for both utilities and community-based organizations.

- Thanks so much for chatting with me today. My hope is to learn more about your utility, the community you serve and how Oregon's Safe Drinking Water Revolving Loan Fund works from a utility perspective.
- We are a part of a national cohort working to ensure that the money that Congress passed last fall in the Bipartisan Infrastructure Law goes toward some of the community-identified water challenges we've been hearing about in \*our state\*.
- \*Describe our organization\*
- These interviews will help inform recommendations we're developing about the drinking water state revolving fund.
- Some of the questions we're exploring are:
  - What's the awareness level around Oregon's Safe Drinking Water Revolving Loan Fund? Who is utilizing it?
  - Are there any barriers for low-income communities to access funding?
  - Are utilities and community members engaging with each other around local water needs?
- We've been engaging with community members across the state more and more on drinking water issues, so we also just want to start a conversation with utilities so we can learn more about the realities of what it takes to supply clean water to folks



## Utilities Templates

### Email Introduction for Utilities

Hello,

My name is \*name\* and I work at \*organization.\* We are currently working on a project to explore drinking water infrastructure needs in frontline communities and find out who is being served (or not being served) by state and federal infrastructure investments. As you know, the Bipartisan Infrastructure Law that passed Congress last fall has a lot of money for drinking water upgrades, and we want to find out if frontline communities are aware and able to get funding for local drinking water needs and identify potential project priorities.

I'm reaching out to see if you are the right person, or if you could connect me to the right person, to discuss local water priorities in \*city\* and discuss some questions about state drinking water revolving loan funds.

Thanks so much for your time,  
\*Signature\*

### Interview Questions for Utilities

Topics	Questions
<i>Regional Context</i>	<ul style="list-style-type: none"> <li>- Tell me a bit about your customer base and drinking water in your region</li> <li>- Do you have any infrastructure projects underway or coming up?</li> <li>- What are some of your long-term goals for the utility?</li> <li>- Are there any specific drinking water challenges facing Portlanders (e.g. lead, crypto, prices)?</li> </ul>
<i>SDWRLF/BIL</i>	<ul style="list-style-type: none"> <li>- What's your experience with Oregon's Safe Drinking Water Revolving Loan Fund?</li> <li>- Have you submitted a Letter of Intent, gone through the whole process to funding, utilized technical assistance, received a SIPP loan (Sustainable Infrastructure Planning Projects)? Why/why not?</li> <li>- Did you get principal forgiveness or reduced interest rates on your loan? What criteria did you meet to secure the subsidies? Did the subsidies make a difference in being able to complete</li> </ul>

	<p>the project and keep rates affordable?</p> <ul style="list-style-type: none"> <li>- How long did it take you to get funding? How long were you on the Project Priority List?</li> <li>- There's a lot of money flowing into the program from the Bipartisan Infrastructure Law. What have you been hearing about that?</li> <li>- Do you follow the IUP process? Have you engaged in it?</li> <li>- Are there ways that you think the program could work better for your needs?</li> <li>- How much subsidy would you need to make the next project feasible?</li> <li>- Did anyone reach out to you to pursue another project? What kind of support is there for small utilities like yours? How did your team learn to manage the utility?</li> <li>- Have you ever utilized the Technical Assistance Circuit Rider program? Was it helpful?</li> <li>- How is inflation affecting projects? Does it make SRF more appealing?</li> </ul>
<p><i>Community Engagement</i></p>	<ul style="list-style-type: none"> <li>- How do you think about local community engagement?</li> <li>- When/why do you reach out to ratepayers/community members? Do you do any regular public involvement activities? What types?</li> <li>- Are there groups in your community that actively engage you around their water needs? Citizen groups, etc.?</li> <li>- We are a community-based organization and we're generally interested in creating more meaningful opportunities for community members to engage in public process. What do you think is appropriate for a state program like the Drinking Water Loan Fund to do to encourage or help utilities with community engagement?</li> </ul>
<p><i>Affordability / Needs</i></p>	<ul style="list-style-type: none"> <li>- How do you think about affordability/equity from the utility perspective?</li> <li>- There are some really interesting affordability-based billing models out there and possibly creative ways that the Drinking Water Loan Fund could be used to help. Is this an area your utility might be interested in exploring? Have you ever done a rates/affordability study?</li> <li>- Are there other areas of concern that you know are coming up in your community around drinking water?</li> <li>- Are there workforce development opportunities within the water utility?</li> </ul>

# VERDE

	<ul style="list-style-type: none"> <li>- Have you completed a lead service line inventory?</li> <li>- What barriers do you see to meeting everyone's drinking water priorities?</li> <li>- What do you need help with? Whether from the state, from EPA, from your community?</li> </ul>
<p><i>Community-led research</i></p>	<ul style="list-style-type: none"> <li>- What questions do you think we should be asking about this program?</li> <li>- What questions do you think need to be asked of other utilities? Community groups? Oregon Health Authority?</li> <li>- Who should we be talking to (specific names)?</li> </ul>
<p><i>Other Questions</i></p>	<ul style="list-style-type: none"> <li>- Our goal is really to make sure that the communities most in need of support are getting the resources they need... that means that the problems people are experiencing are being really seen, someone is trying to address them, and they're getting funded. But there are a lot of broken links in that line...</li> <li>- Do you have any questions for me about this project?</li> <li>- What's the average gal/household/month in your district? Strange that SRF formula based on 7K gal/month</li> </ul>



## Community Based Organization Templates

### Email Introduction to Community Based Organizations

Hello,

I'm reaching out to you to see if I could arrange a time to discuss the Drinking Water Revolving Fund, and water infrastructure funding and needs. Verde is researching how state and federal water infrastructure investments can better serve frontline communities across the state. We're starting by talking with community-based organizations that may have experience engaging on public infrastructure projects or advocating to municipalities or public utilities.

\*Describe our organization\*

We'd love to pick your brains about local drinking water priorities and see how some of the things we're exploring might intersect with your organizing work.

Let me know if you can spare an hour on the phone or video, and when would be some good times to reach you.

Thanks so much for your time,

\*Signature\*

### Interview Questions for Community Based Organizations

Topics	Questions
<i>Context</i>	<ul style="list-style-type: none"> <li>- Can you tell me about some of the communities you support through your housing development projects?</li> <li>- What priorities are on people's minds about their community?</li> <li>- Are you aware of any water issues folks are concerned about?</li> </ul>
<i>Water Relationship</i>	<ul style="list-style-type: none"> <li>- Do you feel like your local water utility is in touch with community water needs?</li> <li>- Does your org have a relationship with any local water utilities?</li> <li>- Do you know of any specific lead-in-water-related concerns in your community?</li> <li>- Do you know of any water infrastructure projects happening locally?</li> </ul>
<i>Awareness</i>	<ul style="list-style-type: none"> <li>- Introduce the Safe Drinking Water Revolving Loan Fund. Are you familiar with this fund or other funds like it?</li> </ul>

	<ul style="list-style-type: none"> <li>- Hearing about this fund, does it spark any ideas about needs in the community or ways it could be used to identify needs?</li> <li>- What barriers do you see around this type of funding or addressing community water needs in general?</li> <li>- Did you follow or are you following the Bipartisan Infrastructure Law funding that passed last fall that will fund lots of drinking water upgrades?</li> </ul>
<p><i>Engagement</i></p>	<ul style="list-style-type: none"> <li>- Have you ever seen any public notices from your water utility? Attended a public meeting?</li> <li>- Have you ever worked with your local water utility on any infrastructure projects?             <ul style="list-style-type: none"> <li>- If yes: What kinds of projects? What is your relationship like with the water utility? What are they working on that impacts your community?</li> </ul> </li> <li>- How do CBOs want to engage in these projects? How do they envision their communities engaging (up front, at the end, throughout)? Who would be or should be engaged in these issues in your community? Is this something that would be a natural fit for your org?</li> <li>- How do you think about infrastructure projects happening in your community? Proactively pushing them vs reactively responding to permits, etc.? How would you go about plugging in?</li> <li>- What kind of engagement activities should be required/would be satisfactory for water utilities making big changes/improvements? (How to avoid box checking?)</li> <li>- How should the state incentivize better community engagement by water utilities?</li> </ul>
<p><i>Experience</i></p>	<ul style="list-style-type: none"> <li>- Do you have experience with federal grants or loans?</li> <li>- Could you support a small utility that needed help applying for project funding to benefit your community? Or as a project management or community engagement contractor? E.g. as a TA provider</li> <li>- How does you like to engage with utilities, perfect world MOU? E.g. pipes need to be updated, we know it's a need but community members might not know the need, how would you want to engage</li> </ul>
<p><i>Community-led research</i></p>	<ul style="list-style-type: none"> <li>- What questions do you think we should be asking about this program?</li> <li>- What questions do you think need to be asked of other CBOs? Utilities? State agencies?</li> <li>- What do you want to know about these public resources?</li> </ul>





	<ul style="list-style-type: none"><li>- Who should we be talking to? Do you know of any CBOs that seem engaged in local water or infrastructure conversations?</li></ul>
<i>Other questions</i>	<ul style="list-style-type: none"><li>- What questions do you have for me about the fund or this project?</li></ul>



## Survey

### Survey Template

#### Background:

Oregon's Safe Drinking Water Revolving Loan Fund provides affordable loans to community water systems to help upgrade aging infrastructure and address public health risks. In 2021, Congress passed the Bipartisan Infrastructure Law, which allocated more than \$35 billion to improve drinking water infrastructure and fix lead problems nationally. This is a great opportunity to connect community-identified water needs with federal funding to address them, but many communities are unaware of how to tap into these resources.

We are trying to learn about current and potential opportunities to better engage communities in drinking water infrastructure planning to address community-identified water priorities.

For more background, view our webinar here:

[https://drive.google.com/file/d/1uQ2\\_Z5ZXV9kocJo\\_UFsBeQ357AM-fMX7/view](https://drive.google.com/file/d/1uQ2_Z5ZXV9kocJo_UFsBeQ357AM-fMX7/view)

*NOTE: THIS SURVEY IS INTENDED FOR COMMUNITY-BASED ORGANIZATIONS OR THOSE ORGANIZING COMMUNITY-MEMBERS FOR CIVIC ENGAGEMENT OF ALL KINDS*

#### Questions:

- What drinking water priorities or concerns have you heard about from your community?
- Does your organization have relationships with any local utilities or municipal services (e.g. water, electricity, transportation, others)?
- How familiar are you with Oregon's Safe Drinking Water Revolving Loan Fund?
  - 1 - Never heard of it before now
  - 6 - Very familiar with fund (e.g. purpose, criteria, processes, funded projects)
- Does your organization have capacity or interest in building capacity to engage with local drinking water projects (i.e. advocate for them, or weigh in on them)?
- Does your organization have capacity or interest in building capacity to contract with local water systems to conduct meaningful community engagement activities?
- What expectations do you have of drinking water providers wanting to engage your organization or community? Do you foresee any barriers to meaningful community engagement?
- What indicators for prioritizing funding and subsidies would be most meaningful for your community to be ranked higher?
  - MHI less than 80% of State MHI
  - MHI less than State MHI
  - MHI less than 120% of State MHI
  - Upper limit of Lowest Quintile Income less than \$25,766
  - More than 30.9% Population Living Under 200% of Poverty Level



- More than 3.4% Unemployment rate for > 16 years of age
- Social Vulnerability Index score greater than 0.80
- Combined sewer and drinking water costs more than 2% for Lowest Quintile Income
- More than 11.7% receiving Food Stamps/SNAP Benefits
- Shrinking population
- Community size
- Would you like to connect more about the Drinking Water State Revolving Fund?