Table of Contents

General Manager’s Message i.
SFPUC Strategic Sustainability Plan Overview ii.
SFPUC Strategic Sustainability Framework iii.
SFPUC Strategic Sustainability Plan FY2010–11 1

Goals
- Provide High Quality Services 1
- Plan for the Future 4
- Promote a Green and Sustainable City 5
- Engage SFPUC’s Public and Invest in Its Communities 7
- Invest in SFPUC’s People 9

Appendix A: Background

Executive Summary A1
Introduction A2
How SFPUC Developed the Strategic Sustainability Plan A3
Plan Framework — Durable and Dynamic Sections A3
Durable Section A5
Dynamic Section A6
Reporting Protocol A7
Mid-Year Performance A7
Annual Performance A7
Biennial Performance and Framework Accounting A11

A Look into the Future A11

Appendix B
Glossary and Abbreviations/Acronyms B1

Appendix C
Primary Sources for Key Performance Indicators C1

Appendix D
Materiality Assessment D1

Figures
A-1: SFPUC Strategic Sustainability Plan Sources A2
A-2: SFPUC Strategic Sustainability Framework A4
A-3: SFPUC Strategic Sustainability Performance Scale and Scoring A8
A-4: SFPUC Strategic Sustainability Template for Profiling Annual Performance Scoring A10
A-5: SFPUC Foresight Planning and the Strategic Sustainability Plan A11
D-1: SFPUC Strategic Sustainability Overview of Method to Assess Materiality D1
General Manager’s Message

In 2008, the PUC released its first Sustainability Plan focused on long-term goals for the organization. Later that year we started a Strategic Planning effort with a 12–18 month forward tracking of performance that we use to manage the day-to-day activities of the organization. For the past few months, we have been working to combine that long-term view with real time activities tracking. As a result we are pleased to present the San Francisco Public Utilities Commission’s (SFPUC) Strategic Sustainability Plan for Fiscal Year 2010–11.

The Plan provides SFPUC with a system for planning, managing and evaluating SFPUC-wide performance that takes into account the long term economic, environmental and social impacts of our business activities.

SFPUC will evaluate its performance semi-annually and provide an annual score card. Using its performance indicators, SFPUC will measure the progress it makes each year in improving its performance toward reaching its objectives and goals.

We present the Plan to offer you, our stakeholders, this high level view of SFPUC’s priority activities. We hope that you will use it as a tool to understand and track our strategic and sustainability performance, as we regularly report on our progress. We expect to use the Plan for everything from individual job goal setting and performance evaluations to our annual public Commission retreat and planning session we have each July.

We believe that SFPUC’s Strategic Sustainability Plan will provide us with the trending data necessary to ensure that our long term goals and objectives continue to drive our business decisions, and that this investment in a robust Plan is fundamental to our capacity to continue providing high quality services to our current customers and to those of future generations.

We have posted our Strategic Sustainability Plan at www.sfwater.org/sustainability and invite your views and comments.

Sincerely,

Ed Harrington
General Manager
SFPUC Strategic Sustainability Plan Overview

The SFPUC’s **Strategic Sustainability Plan** is a system for planning, managing and evaluating SFPUC-wide performance that takes into account the long term economic, environmental and social impacts of our business activities.

**How to Use the Framework for Fiscal Year Planning**

<table>
<thead>
<tr>
<th>DURABLE SECTION</th>
<th>DYNAMIC SECTION</th>
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<tbody>
<tr>
<td>Goal</td>
<td>Action</td>
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<tr>
<td>Sustain-</td>
<td>12–18 Month</td>
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<td>ability</td>
<td>Target / Measure</td>
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<td>Category</td>
<td>Lead / Division</td>
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<td>Objective</td>
<td>Completion Date</td>
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<td>Key Performance</td>
<td>FY2010–11 Adopted Budget</td>
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<td>Indicators (KPIs)</td>
<td>FY2011–12 Adopted Budget</td>
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<td>Proposed FY2012–13 Budget</td>
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<td></td>
<td>10-year Capital Plan</td>
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</table>

**ANNUAL IMPLEMENTATION:** Each SFPUC Division Lead reviews each goal and objective. Working together, the Division Leads then decide on priority actions for each objective for the coming Fiscal Year. This includes decisions on the associated 12–18 month targets, Division Leads, completion dates and budgets. SFPUC will report semi-annual progress toward the goals and objectives.

**DURABLE SECTION:** Contains goals, objectives, and performance indicators to implement SFPUC’s vision and values. It is the long-term frame that will remain fairly static, yet retains the flexibility to be revised as SFPUC’s services, customers and communities evolve.

**GOALS AND OBJECTIVES DRIVE ACTIONS:** Use the goals and objectives to drive.

**KEY PERFORMANCE INDICATORS (KPIs):** Use KPIs as a tool to evaluate and benchmark continuous improvement toward goals and objectives over the long term, not to measure progress on individual fiscal year actions.

**DYNAMIC SECTION:** Contains specific actions, targets, measures and budgeting. The dynamic section will be updated annually as old actions are completed and new actions are defined to meet the objectives and goals in the durable section.

**Why We Have a Strategic Sustainability Plan**

- To ensure our goals and objectives drive our actions toward environmental, social and economic sustainability. Their implementation furthers our mission, which is:
  
  To provide our customers with high quality, efficient and reliable water, power and sewer services in a manner that is inclusive of environmental and community interests and sustains the resources entrusted to the SFPUC's care.

- Implementing our Strategic Sustainability Plan will create opportunities to collaborate, streamline reporting, track progress, and integrate long-term planning and budgeting.

- Proposition E, passed in 2002, requires strategic planning.

**How the Plan was Created**

- The Strategic Sustainability Plan results from the integration of the Strategic Action Plan, the Sustainability Plan and Program, and budgeting.

- See Appendix A for details on how the Plan was created.
SFPUC Strategic Sustainability Framework

**Strategic Sustainability Framework**

**Provide High Quality Services**

**Promote a Green and Sustainable City**

**Engage SFPUC’s Public and Invest in its Communities**

**Invest in SFPUC’s People**

**Plan for the Future**

**12–18 Month Targets/Measures**

**Lead/Division**

**Completion Date**

**Budgets**

**Durable Section**

- A. Ensure compliance with regulatory requirement
- B. Enhance partnerships with City Departments, Agencies, & Raker Act entities
- C. Provide high quality service to all customers, including customers who are most vulnerable to service interruptions
- D. Foster customer satisfaction
- E. Create agreements to support potential SFPUC customers due to developments in San Francisco
- F. Drive accountability and transparency
- G. Strengthen financial performance
- H. Implement procurement, supply chain & contracting procedures to improve goods & services procured
- I. Optimize relevant technological innovations
- J. Optimize maintenance for water, wastewater & power assets
- K. Improve capital facilities through construction
- L. Align rate structure to reflect conservation, full costs of providing service & affordability
- M. Enhance meter reading technology & billing accuracy
- N. Optimize planning to meet water, wastewater & power demand
- O. Advance strategic & sustainability planning, management & decision-making
- P. Support and draft relevant public policy legislative initiatives
- Q. Develop & implement SFPUC-wide risk assessment & management
- R. Advance security, emergency planning & response
- S. Address climate change concerns, including adaptation & greenhouse gas mitigation
- T. Diversify high quality water sources and advance water efficiency, conservation & more
- U. Become a leader in environmental stewardship e.g. habitat, biodiversity & land management
- V. Increase energy efficiency & conservation
- W. Advance high quality & emissions-free power supply sources
- X. Reduce inflows to the sewer system & ensure quality effluent
- Y. Reduce SFPUC in-house environmental impacts
- Z. Promote environmental justice
- AA. Update & improve SFPUC’s social media outreach & website to foster interaction & increase community awareness/education about SFPUC activities
- BB. Advance outreach efforts in SFPUC communities, including possible new community partnerships
- CC. Foster engagement with current & developing stakeholder groups
- DD. Develop Community Benefits Program

**SFPUC’s Strategic Sustainability Plan is a system for planning, managing, and evaluating SFPUC-wide performance that takes into account the long term economic, environmental and social impacts of our business activities.**

SFPUC’s framework integrates the triple bottom line perspective through the 5 long term goals, 6 sustainability categories and over 30 objectives most material to the SFPUC. These comprise the durable section of the framework, called so because it drives management’s more dynamic fiscal-year choices of specific actions, targets and budgets that are intended to make continuous progress on the goals and objectives.
### DURABLE SECTION

<table>
<thead>
<tr>
<th>Goal</th>
<th>Sustainability Category</th>
<th>Objective</th>
<th>Key Performance Indicators (KPIs)</th>
<th>Action</th>
<th>12 - 18 Month Target / Measure</th>
<th>DYNAMIC SECTION</th>
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</thead>
<tbody>
<tr>
<td>A. Ensure compliance with regulatory requirements</td>
<td>Governance &amp; Management</td>
<td>(EN 14.1) Incidents of, and fines or non-monetary sanctions for, non-compliance with applicable laws and regulations</td>
<td>Full compliance / No violations</td>
<td>1. Comply with California Department of Public Health permits</td>
<td>1. Comply with California Department of Public Health permits</td>
<td>1. Comply with California Department of Public Health permits</td>
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<td>(EN 7.1) Drinking water quality compliance rate (days in full compliance)</td>
<td>Full compliance / No violations</td>
<td>2. Comply with State Regional Water Quality Control Board permits</td>
<td>2. Comply with State Regional Water Quality Control Board permits</td>
<td>2. Comply with State Regional Water Quality Control Board permits</td>
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<td>3. Comply with electric regulatory compliance requirements</td>
<td>Complete transmission owner and operator compliance registration with Western Electricity Coordination Council and associated agreements / Outcome achieved</td>
<td>Complete transmission owner and operator compliance registration with Western Electricity Coordination Council and associated agreements / Outcome achieved</td>
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<td>4. Comply with all wastewater permits</td>
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<tr>
<td>B. Provide high quality service to all customers, including customers who are most vulnerable to service interruptions</td>
<td>Communication &amp; Management</td>
<td>(GM 1.4) Describe the benefits of partnerships to quality of services</td>
<td>Full compliance / No violations</td>
<td>5. Implement Water Supply Agreement</td>
<td>Develop interim supply allocations for wholesale customers / Adopted interim supply allocations</td>
<td>Develop interim supply allocations for wholesale customers / Adopted interim supply allocations</td>
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<td>Develop Water Quality Notification Plan / Plan completed</td>
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<td>Prepare report on state of regional water system / Report completed</td>
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<td></td>
<td>Develop Environmental Enhancement Surcharge / Outcome achieved; Environmental Enhancement Surcharge adopted as part of FY2011-12 rates</td>
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<td>Complete MOU with the San Francisco Fire Department for AWSS operation and maintenance</td>
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<td>Provide capital planning and project management services to the San Francisco Port for water, wastewater, and power services</td>
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<td>6. Integrate the Auxiliary Water Supply System into the existing operation</td>
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<td>7. Provide design specifications for City Build new headquarters to identify potential water, wastewater, and power supply and transmission development and other issues</td>
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<td>8. Integrate with Modesto and Turlock Irrigation Districts and others for water and power supply and transmission development and other issues</td>
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<td>9. Coordinate with the City to promote green initiatives</td>
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<tr>
<td>C. Provide high quality service to all customers, including customers who are most vulnerable to service interruptions</td>
<td>Communication &amp; Management</td>
<td>(CR 1.3) Percent of current services meeting level of service goals for water, wastewater, and power</td>
<td>10. Improve partnerships with Modesto and Turlock Irrigation Districts and others for water and power supply and transmission development and other issues</td>
<td>10. Improve partnerships with Modesto and Turlock Irrigation Districts and others for water and power supply and transmission development and other issues</td>
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<td>Develop MOU covering water transfers and Federal Energy Regulatory Commission re-licensing of New Don Pedro with the Districts / MOU completed</td>
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<td>Identify opportunities for green demonstration projects with City departments, Develop incentives for City departments to reduce and conserve / Three pilot projects identified and plans developed; Outcome achieved</td>
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<td>Support City Administrator efforts to encourage electric vehicle deployment / Study report to load, effects on interconnection, rate issues, and identify GHG impact / Study complete</td>
</tr>
<tr>
<td>D. Foster customer satisfaction</td>
<td>Communication &amp; Management</td>
<td>(CR 1.1) Percent of retail customers that rate SFPUC as good or better</td>
<td>Customers</td>
<td>11. Coordinate with the City to promote green initiatives</td>
<td>11. Coordinate with the City to promote green initiatives</td>
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<td></td>
<td>(CR 1.2) Average rating by wholesale customers of SFPUC</td>
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<td>Performance goal is to achieve 90% customer satisfaction survey result conducted through NCE Feedback solution interfaced with our Interactive Voice Response System. Actual customer satisfaction survey result for calendar 2010 is 84%. We are confident that we will achieve a 90% or higher result.</td>
</tr>
</tbody>
</table>

A: Annual  
S.A: Semi-Annual  
KPIs: Continuous progress on meeting objectives is measured through use of KPIs
| Goal                                                                 | Sustainability Category                       | Objective                                                                 | Key Performance Indicators (KPIs)                                                                                                                                                                                                 | Action                                                                                           | Dynamic SECTION                                                                 |
|---------------------------------------------------------------------|-----------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| 1. Create agreements to support potential SFPUC customers due to developments in San Francisco                 | (CR 1.4) Increase collaborations to support potential SFPUC customers       | A                                                                         | 16. Create development agreements for Hunter's Point Shipyard and Candlestick covering wastewater, water and power services. Review, comment, and approve project subvision applications and the related public infrastructure as described in the Interagency Cooperation Agreement. Approve subvision applications as requested. Continue Wastewater Study to identify project opportunities. | Consultation, comment and approval of project subvision applications. Continue development agreements for Hunter's Point Shipyard and Candlestick covering wastewater, water and power services. Continue Wastewater Study to identify project opportunities. | Status Achieved 2011 Complete in FY2011-12 |
| 2. Drive accountability and transparency                             | (GM 1.2) Management is held accountable for project and division performance through audits and performance reports. | A                                                                         | 16. Identify and implement best practices, performance review, and audit findings. Implement Wastewater warehouse audit recommendations & use best practices at other facilities. | Implement Wastewater warehouse audit recommendations & use best practices at other facilities. Complete energy efficiency program review / Report published. | Quality of goods and services procured achieved 2011 Complete in FY2011-12 |
| 4. Implement procurement, supply chain, and contracting procedures to improve goods and services procured         | (GM 12.2) Percent of contractors and professional service firms for which post-project quality and satisfaction reviews have been carried out. | A                                                                         | 20. Implement Department-wide procurement procedures to ensure quality of goods and services procured. Consultant performance evaluation criteria and forms were developed. | Consultant performance evaluation criteria and forms were developed. | Quality of goods and services procured achieved 2011 Complete in FY2011-12 |

**SFPUC Strategic Sustainability Plan FY2010-11**
<table>
<thead>
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<th>Goal</th>
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<th>Key Performance Indicators (KPIs)</th>
<th>Action</th>
<th>Measure</th>
<th>Lead / Division</th>
<th>FY2010-11 Proposed Budget</th>
<th>FY2011-12 Proposed Budget</th>
<th>10-year Capital Plan</th>
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<td>DURABLE SECTION</td>
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<tr>
<td>1. Optimize relevant technological innovations</td>
<td></td>
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<td>(GM 7.4) Percent proposed/current projects using new technologies or demonstrating technological best practice</td>
<td>25-Implement Online Invoicing System (SOLUS)</td>
<td>Pilot Implementation of Online Invoicing System (SOLUS) / Payment of invoices for over 200 contracts through SOLUS</td>
<td>Kelly / INF</td>
<td>June-2011 Operating Budget</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
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<td>24-Design and procure an electronic web-based bidding system (G-bidding/S proposal)</td>
<td>Procurement and Pilot system / All RFPs and 5 Construction Contract Bids performed through online bidding software</td>
<td>Kelly / INF</td>
<td>June-2011 Operating Budget</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
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<td>25-Implement SCADA consistently across agency</td>
<td>Implement SFPUC-wide SCADA Working Group: Ensure all Water &amp; Power SCADA &amp; WW DCS plans are approved by the SCADA Working Group and reported out through the new Business Technology Council. Incorporation of AWSS SCADA / SCADA Working Group convened; And AWSS SCADA incorporated into SFPUC</td>
<td>Rybatron / BUS Svms</td>
<td>June-2011</td>
<td>$700,000</td>
<td>Complete in FY2010-11</td>
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<td>26-Implement IT Strategic Plan</td>
<td>Publish Plan in July 2010. Implement as outlined therein / System implementation on track with key deliverables dates shown in the IT Strategic Plan; dated July 2010</td>
<td>Rybatron / BUS Svms</td>
<td>Multiple Operating Budget</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
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<td>27-Implement and standardize the upgraded Maximo as the SFPUC's Asset Management Control System for all three Enterprises</td>
<td>Finish 7.1.6 upgrade by November 2010 / Upgraded system operational</td>
<td>Rybatron / BUS Svms</td>
<td>Nov-2010</td>
<td>$450,000</td>
<td>Complete in FY2010-11</td>
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<td>(IA 5.3) System renewal replacement rates for water, wastewater, and power assets</td>
<td>(IA 5.3) System renewal replacement rates for water, wastewater, and power assets</td>
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<td>(IA 5.1) Preventive maintenance ratios for water and wastewater</td>
<td>Identify projects beginning in FY2011-10 with associated scopes, schedules, and budgets (including all available funding sources and shortfalls); Standardize condition assessment and replacement cycle budgeting across SFPUC. Hetchy Hatchy process to serve as model SFPUC-wide / Provide scope, schedule and budgets for all capital projects that are a part of the 10-Year Capital Improvement Plan; R&amp;R policy and procedure implemented. Conditions assessments completed for 50% of assets, by value</td>
<td>Carlin / Dep GM Kelly / INF</td>
<td>Ongoing Infrastructure Budget</td>
<td>Operating Budget</td>
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<td>(IA 1.1) Percent of assets by value covered by asset management plan</td>
<td>50% Completion of Sewer Assessment, hire dedicated PM with crew / 50% Completion of sewer assessment; 8 miles of sewers replaced</td>
<td>Mosaik / WWE</td>
<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>(IA 6.2) Non-revenue water: difference between water supplied and water sold (i.e. volume of water &quot;lost&quot; expressed as a percent of net water supplied)</td>
<td>50% Completion of Water Assessment; hire dedicated PM with crew / 50% Completion of water assessment; 20% of water loss covered</td>
<td>Mosaik / WWE</td>
<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>(IA 6.1) Water Loss: volume of water loss expressed as a percent of net water supplied</td>
<td>50% Completion of Water Assessment; hire dedicated PM with crew / 50% Completion of water assessment; 20% of water loss covered</td>
<td>Mosaik / WWE</td>
<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>(IA 1.2) Deviation in actual vs. planned facilities project expenditures and schedules</td>
<td>6 miles of sewers replaced / 50% Completion of sewer assessment; 8 miles of sewers replaced</td>
<td>Mosaik / WWE</td>
<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>(IA 2.4) Percent construction projects on track for compliance with level of service goals</td>
<td>6 miles of sewers replaced / 50% Completion of sewer assessment; 8 miles of sewers replaced</td>
<td>Mosaik / WWE</td>
<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>Mosaik / WWE</td>
<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>30-Provide adequate facilities for staff - Construction of Seahaven Golden Gate</td>
<td>Substantial construction completed / Outcome achieved</td>
<td>Carlin / Dep GM Kelly / INF</td>
<td>Apr-2012</td>
<td>$190,8M</td>
<td>None</td>
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<td>31-Provide adequate facilities for staff - Plan for uprating all facilities</td>
<td>Project Managers assigned; Facilities needs assessment completed; Prepare preliminary site layouts and cost estimates. Begin planning process for Southeast Campus that would address water, wastewater and power needs / Site Layout and preliminary costs estimates for Milpitas, Sunnyvale and Milbrae campuses</td>
<td>Carlin / Dep GM Kelly / INF</td>
<td>Jun-2011</td>
<td>Capital Budget</td>
<td>Capital Budget</td>
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<td>Jun-2011</td>
<td>$28M</td>
<td>Complete in FY2010-11</td>
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<td>32-Prevent sewer replacement (SSIP) &amp; begin the increase of sewer replacement</td>
<td>Certification of EIRs; Award of Construction Contracts totaling a certain dollar value; Value of Projects in Construction; Completed Projects / Certify &amp; EIR: Award 9 construction contracts; totaling $850M; Have projects worth $2B in construction; Complete 17 projects</td>
<td>Kelly / INF</td>
<td>All WISP Dec 2015</td>
<td>WISP funds</td>
<td>WISP funds</td>
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<td>33-Build WISP on schedule, within budget and within scope; Plan, design, construction, bid and award close-out, and completion of regional and local projects</td>
<td>Gain City Planning, Controller’s Office, Civil Service Commission approval for WISP projects to move into construction / Number of projects with City Planning Commission approval of EIRs, Controller’s Office for release of reserve funds; Number of projects with Civil Service Commission approval of contracts</td>
<td>Kelly / INF</td>
<td>Ongoing WISP funds</td>
<td>WISP funds</td>
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<td>34-Coordinate and secure City agency approvals for WISP projects</td>
<td>Gain City Planning, Controller’s Office, Civil Service Commission approval for WISP projects to move into construction / Number of projects with City Planning Commission approval of EIRs, Controller’s Office for release of reserve funds; Number of projects with Civil Service Commission approval of contracts</td>
<td>Kelly / INF</td>
<td>Ongoing WISP funds</td>
<td>WISP funds</td>
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</table>

A: Annual
S.A: Semi-Annual
KPIs: Continuous progress on meeting objectives is measured through use of KPIs
### Objective
**Customers**
1. Align rate structure to reflect conservation, full costs of providing service, and affordability

   *(CR 6.4)* Percent rate and fee structure that encourages conservation and is designed to reduce peak demands on the system.

   *(CR 6.3)* Average price per kWh municipal power delivered, 100 cubic ft wastewater treated, and 100 cubic ft water delivered, as percent average cost to deliver.

   *(CR 5.1)* Average residential water, wastewater and power bill as percent of median income in San Francisco.


2. Enhance meter reading technology and billing accuracy

   *(CR 3.1)* Billing Accuracy = water/wastewater/power = Number of error-driven billing adjustments per 10,000 bills generated.

   *(CR 3.3)* Percent of customers that are metered.

   *(CR 3.4)* Percent of customers with advance metering.


3. Optimize planning to meet water, wastewater, and power demand

   *(EN 13.1)* Show progress on long-term integrated resource planning to meet future water, wastewater, and power demand in a reliable and sustainable manner.


### Key Performance Indicators (KPIs)

<table>
<thead>
<tr>
<th>Action</th>
<th>12 - 18 Month Target / Measure</th>
<th>Lead / Division</th>
<th>Completion Date</th>
<th>FY2010-11 Budget</th>
<th>FY2011-12 Proposed Budget</th>
<th>10-year Capital Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong></td>
<td>35-Complete cost of service and rate design study to inform/support new customer base</td>
<td>New electric rates adopted / Outcome achieved</td>
<td>Ryabtrom / BU/BS Minca</td>
<td>Dec-2010</td>
<td>$1,396K</td>
<td>Complete in FY2010-11</td>
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<tr>
<td><strong>1.</strong></td>
<td>36-Develop revenue requirements and rate design policies for power customers</td>
<td>Present independent rate study and rate fairness board review of retail electric rates to Commission; Approve Retail electric rates for redevelopment areas; develop and implement Power Enterprise fund balance policies that are consistent with existing policies while establishing new contingency funds (Rate Stabilization Fund; Green Power, Capital Fund); develop Power Enterprise revenue requirement and cost of service modeling to allow annual revisions during budget process.</td>
<td>Ryabtrom / BU/BS Minca</td>
<td>Early 2011</td>
<td>Existing Staff and $146,000 independent rate consultant contract as required by the SF Charter at least every 5 years.</td>
<td>Existing Staff</td>
</tr>
<tr>
<td><strong>2.</strong></td>
<td>27-Continue to improve baseline metering technology and Water Data Management functionality</td>
<td>Staff self-sufficient in performing function / Positive California ISO audits of validation, billing, estimation and Meter Data Management Agent functionality.</td>
<td>Hale / PWR</td>
<td>Ongoing</td>
<td>$701,356 remaining encumbered</td>
<td>$550,000 leaving $15,600 in contract capacity.</td>
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<tr>
<td><strong>2.</strong></td>
<td>38-Implement Automated Water Meter Program</td>
<td>Network control computer and collector system installed; 1/3 meters installed; Testing of data with Customer Information System / Outcome achieved</td>
<td>Ritchie / WE</td>
<td>Feb-2011</td>
<td>$623M</td>
<td>Complete in FY2010-11</td>
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<tr>
<td><strong>2.</strong></td>
<td>39-Procure and install automated electric meters</td>
<td>Meters installed and operating at Hunters Point and some municipal customer sites. Electricity savings programs developed / 150 automated meters installed; Electricity savings programs available</td>
<td>Hale / PWR</td>
<td>Jun-2012</td>
<td>$1.1M</td>
<td>$250,000</td>
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<tr>
<td><strong>3.</strong></td>
<td>40-Complete planning for the Sewer System Improvement Program (SSIP)</td>
<td>Commission adopts the SSIP / Begin EIR</td>
<td>Msake / WVE</td>
<td>Fall 2010</td>
<td>Adequate</td>
<td>Complete in FY2010-11</td>
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<tr>
<td><strong>3.</strong></td>
<td>41-Identify preferred method for providing electric service to SFD (existing agreement terminates July 2013)</td>
<td>Develop strategy / Outcome achieved</td>
<td>Hale / PWR</td>
<td>2011</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
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<tr>
<td><strong>3.</strong></td>
<td>42-Complete preliminary studies for new renewable technologies including ocean wave, geothermal, qualifying small hydro and in-line hydro</td>
<td>Preliminary study of commercial-scale wind sited at Twin Peaks complete; Preliminary design, University Mound in-line hydro complete / Study complete</td>
<td>Hale / PWR</td>
<td>On-line Mar-2013</td>
<td>$6.2M</td>
<td>$4.3M</td>
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<tr>
<td><strong>3.</strong></td>
<td>43-Determine alternative methods for obtaining electric transmission, distribution, and banking services provided under Interconnection Agreement with PG&amp;E</td>
<td>Prepare alternatives study / Study complete</td>
<td>Hale / PWR</td>
<td>Dec-2011</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
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<td><strong>3.</strong></td>
<td>44-Update Electric Resource Plan, identifying resource portfolio options for meeting customer and citywide demands given financial resources, including stakeholder input</td>
<td>Technical Advisory review complete; public engagement on draft; Final plan endorsed by PUC and BDSM / Final plan endorsed by PUC and BDSM</td>
<td>Hale / PWR</td>
<td>Tech review Aug 2010; Overall Spring 2010</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
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<td><strong>3.</strong></td>
<td>45-Complete Power Business Plan</td>
<td>Plan completed</td>
<td>Hale / PWR</td>
<td>Dec-2011</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
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<td><strong>3.</strong></td>
<td>46-Identify and maintain streetlight portfolio</td>
<td>Develop pedestrian and street lighting policy; Develop policy on neighborhood use of poles and electricity / Neighborhood use policy adopted; Public engagement on pedestrian and street lighting policy underway</td>
<td>Hale / PWR</td>
<td>Policy Sept 2010; Public engagement June 2011; FY 2011/12</td>
<td>$348,874</td>
<td>None</td>
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<tr>
<td><strong>3.</strong></td>
<td>47-Develop water conservation financial plan (Green Finance SF)</td>
<td>Develop municipal conservation financial plan / Distribute municipal loans and grants if available</td>
<td>Ritchie / WE</td>
<td>Ongoing</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
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</table>
### DURABLE SECTION

<table>
<thead>
<tr>
<th>Goal</th>
<th>Sustainability Category</th>
<th>Objective</th>
<th>Key Performance Indicators (KPIs)</th>
<th>Action</th>
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<th>Proposed FY2013-14 Budget</th>
<th>10-year Capital Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>SFPUC Strategic Sustainability Plan FY2010–11</td>
<td>City Sustainable Green and Future</td>
<td>(GM 1.1) Use Integrated Strategic Plan-Phase 1 for senior level planning, management, budgeting and reporting on performance</td>
<td>S-F</td>
<td>4B - Integrate and consolidate SFPUC Sustainability Plan and GM’s Action Plan</td>
<td>Complete integration and consolidation of SFPUC’s Sustainability Plan and the GM’s Action Plan / Outcome achieved</td>
<td>Harrington / GM Ellis / EXT Affs</td>
<td>Jan 2011</td>
<td>$300,000</td>
<td>Complete in FY2010-11</td>
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<tr>
<td>Plan for the Future (Cont.)</td>
<td>Governance &amp; Management</td>
<td>(GM 10.2) Periodically conduct impartial expert sustainability accounting of Strategic Plan to ensure continuing materiality, comprehensiveness, responsiveness and rigor</td>
<td>A</td>
<td>4G - Begin implementation of the program resulting from integration of strategic sustainability plan including reporting protocols and plan for FY 2012/13 biennial evaluation and baseline update</td>
<td>Strategic planning in place and implementation in progress, including reporting protocols / Implementation in progress</td>
<td>Harrington / GM Ellis / EXT Affs</td>
<td>Summer 2011</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
<td>TBD</td>
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<td>(GM 5.2) Number of legislative proposals introduced or supported through partnership and approved</td>
<td>S-A</td>
<td>5B - Track all local, state, federal legislation that may impact sustainability or operations of the PUC or City of San Francisco. Take positions as appropriate</td>
<td>Annual Commission report of legislation tracked, supported, work with lobbyists, and PUC-drafted new legislation / Outcome achieved</td>
<td>Ellis / EXT Affs</td>
<td>Ongoing</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
<td>TBD</td>
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<tr>
<td>SFPUC Strategic Sustainability Plan FY2010–11</td>
<td>Goal</td>
<td>(GM 9.1) Develop risk management process to identify, assess and manage risks (e.g. environmental, financial, license to operate, political, regulatory, reputational, services/operations)</td>
<td>A</td>
<td>51 - Develop and implement Environmental Management Systems</td>
<td>Develop biocides handling system; develop asset management system / International Organization for Standardization (ISO) 14001 Environmental Management Standard.</td>
<td>Mosle / WWE Biosolids: 10/2010 Asset Mgt FY2012-13</td>
<td>SSP + Existing Operating Budget</td>
<td>SSP + Existing Operating Budget</td>
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<td>52 - Develop departmental, enterprise, and division risk management tools</td>
<td>Hire a new SFPUC Risk Manager, who will be charged with and will maintain a complete inventory of enterprise risks, a consolidated summary of all insured and self-insurance risks, and quarterly monitoring of insurer exposures. Timely renewal and re-negotiation of all insured coverages.</td>
<td>Ryabston / BUS Sncs</td>
<td>11/11/2010 for Recruitment / June 2011 all other.</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
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<td>$0</td>
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<td>(IA 4.5) Number of plans completed to address and recover from emergencies, disasters and security risks; Number of required simulation and practice exercises completed</td>
<td>A</td>
<td>53 - All emergency responders complete appropriate FEMA training</td>
<td>Provide training for Level 1 and 2 responders and all SFPUC employees as Disaster Service Workers / 70% training completed for Level 1 and 2 responders; 100% training completed for all employees as Disaster Service Workers</td>
<td>Carlin / Dep GM</td>
<td>June 2011</td>
<td>Operating Budget</td>
<td>Complete in FY2010-11</td>
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<td>55 - Develop and implement IT disaster recovery plan aligned with the IT Strategic Plan</td>
<td>IT and Power staff collaborate and prepare plan, focusing on Power operations for year one / Plan prepared for Power</td>
<td>Ryabston / BUS Sncs</td>
<td>June 2011</td>
<td>Operating Budget</td>
<td>Complete in FY2010-11</td>
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<td>(EN 16.1) SFPUC’s direct and indirect greenhouse gas (GHG) emissions per year</td>
<td>A</td>
<td>6B - Work with the Treasure Island Project Team to design and implement innovative strategies that strive for zero greenhouse gas emissions</td>
<td>Work with Treasure Island Community Development team to report on heat practices in energy performance and recommendations to minimize greenhouse gas footprint, including the development of an electricity demand reduction program utilizing automated meters and home area networks / Implement program in FY 2010-11</td>
<td>Hale / PWR Mosle / WWE Ricchez / WE</td>
<td>Dec 2011</td>
<td>$100M in SSP Budget</td>
<td>Ongoing</td>
<td>Ongoing</td>
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<td>57 - Increase water use efficiency</td>
<td>Implement low income Direct Installation Program and install 2000 toilets / Install toilets</td>
<td>Ritchies / WE</td>
<td>Jun 2011</td>
<td>$1.2M</td>
<td>$1.2M</td>
<td>$1.2M</td>
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<td>58 - Implement recycled water projects</td>
<td>(0.3 mgd recycled water produced. Complete Harding Park and Sharp Park recycled water projects / Outcome achieved</td>
<td>Ritchies / WE</td>
<td>Harding Feb 2012; Sharp Aug 2011</td>
<td>WSSP / Water Enterprise Operations Funded by FY2010-11 budget</td>
<td>Funded by FY2010-11 budget</td>
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<td>59 - Promote grey water use</td>
<td>Provide up to 150 home installation kits and offer trainings / Distribution of home kits</td>
<td>Ritchies / WE</td>
<td>Jun 2011</td>
<td>Existing Staff</td>
<td>Complete in FY2010-11</td>
<td>Continued efforts</td>
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<td>DURABLE SECTION</td>
<td>DYNAMIC SECTION</td>
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<td><strong>10-year Capital Plan</strong></td>
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<td><strong>II. Become a leader in environmental stewardship, e.g. habitat, biodiversity, and land management</strong></td>
<td><strong>Environmental &amp; Natural Resources</strong></td>
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<td><strong>(EN 2.2) Implement programs to ensure common ownership of environmental stewardship among all SFPUC employees</strong></td>
<td></td>
<td><strong>30-Report on Watershed Environmental Improvement Plan implementation</strong></td>
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<td>Ritchie / WE</td>
<td>Dec-2010</td>
<td>Complete in FY2010-11</td>
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<td><strong>(EN 2.3) Show progress on habitats protected, restored or preserved</strong></td>
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<td><strong>V. Increase energy efficiency and conservation</strong></td>
<td><strong>Environmental &amp; Natural Resources</strong></td>
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<td><strong>(EN 12.1) Municipal electric and gas use and kWh of energy used per street light</strong></td>
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<td><strong>(EN 12.2) Annual peak load reduction and total electricity and gas reduction achieved by customers; Number of customer energy audits completed</strong></td>
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<tbody>
<tr>
<td>A.</td>
<td>Environment &amp; Natural Resource</td>
<td>X. Reduce inflows to the sewer system and ensure quality effluent</td>
<td>(EN 11.3) Reduction in peak storm flows to combined system due to low impact development initiatives and/or surface drainage management plans</td>
<td>T5-Reduce storm water inflow through LID projects</td>
<td>Increase number of LID projects including rain barrel distribution -- number will be determined by SSIP outcome(s) / Number of projects completed, volume of storm water diverted via program</td>
<td>Mosaiq / WWE</td>
<td>Ongoing</td>
<td>SSIP / Adequate</td>
<td>Ongoing</td>
</tr>
<tr>
<td>A-S</td>
<td>Semi-Annual</td>
<td></td>
<td>(EN 10.1) Number of days that water quality bacteria levels do not meet EPA requirements as a result of sewer overflows</td>
<td>T4-Reduce pollutant inflow through grease recycling</td>
<td>Upon BOS approval of FOG Ordinance, launch Automatic Grease Removal Devices installation in restaurants / Increase restaurant participation in the grease collection program by 100</td>
<td>Mosaiq / WWE</td>
<td></td>
<td>Adequate</td>
<td>Complete in FY2010-11</td>
</tr>
<tr>
<td>A-S</td>
<td>Semi-Annual</td>
<td></td>
<td></td>
<td>T5-Reduce pollutant inflow through construction erosion control</td>
<td>BOS approval of Construction Run-off Ordinance / Outcome achieved</td>
<td>Mosaiq / WWE</td>
<td></td>
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## DYNAMIC SECTION

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<th>Goal</th>
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<th>Objective</th>
<th>Key Performance Indicators (KPIs)</th>
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<th>12 - 18 Month Target / Measure</th>
<th>Lead / Division</th>
<th>FY2010-11 Adopted Budget</th>
<th>FY2011-12 Proposed Budget</th>
<th>10-year Capital Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.</td>
<td>Community</td>
<td>2. Promote environmental justice</td>
<td>(CY 1.2) Identify nature and extent of environmental impacts attributable to the SFPUC that are disproportionately impacting certain communities</td>
<td>T6-Implement composting at remaining in-city SFPUC locations</td>
<td>Implement composting at remaining in-city SFPUC locations / Outcome achieved</td>
<td>Ellis / EXT Alra</td>
<td>Jan-2011</td>
<td>Adequate</td>
<td>Complete in FY2010-11</td>
</tr>
<tr>
<td>A</td>
<td>Community</td>
<td></td>
<td>(CY 2.4) Progress on actions to institutionalize environmental justice policy</td>
<td>T7-Create workplace-friendly policies for bike-to-work (showers, promotion of bike storage spaces)</td>
<td>Create workplace-friendly policies for bike-to-work (showers, promotion of bike storage spaces) / Outcome achieved</td>
<td>Ellis / EXT Alra</td>
<td>Jun-2011</td>
<td>Adequate</td>
<td>Complete in FY2010-11</td>
</tr>
<tr>
<td>A</td>
<td>Community</td>
<td></td>
<td></td>
<td>T8-Create new kiosk in lobby of 1155 Market to provide recycling, composting, other safe disposal opportunities (batteries, CFLs) and information to staff and visitors</td>
<td>Create new kiosk in lobby of 1155 Market to provide recycling, composting, other safe disposal opportunities (batteries, CFLs) and information to staff and visitors / Outcome achieved</td>
<td>Ellis / EXT Alra</td>
<td>Feb-2011</td>
<td>Adequate</td>
<td>Complete in FY2010-11</td>
</tr>
<tr>
<td>A</td>
<td>Community</td>
<td></td>
<td></td>
<td>T9-Support design review for 525 Golden Gate</td>
<td>Build LEED Platinum building / Review and comment on design changes, track construction progress</td>
<td>Harrington / GM</td>
<td>Jun-2011</td>
<td>$190.6M</td>
<td>Complete in FY2010-11</td>
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<tr>
<td>A</td>
<td>Community</td>
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**Notes:**
- **A:** Annual
- **S-A:** Semi-Annual
- **KPIs:** Continuous progress on meeting objectives is measured through use of KPIs

**SFPUC Strategic Sustainability Plan FY2010–11**
<table>
<thead>
<tr>
<th>SFPUC Strategic Sustainability Plan FY2010–11</th>
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### DURABLE SECTION

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<tr>
<th>Goal</th>
<th>Sustainability Category</th>
<th>Objective</th>
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<th>FY2011-12 Adopted Budget</th>
<th>Proposed FY2012-13 Budget</th>
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</tr>
</thead>
</table>

#### Community

- **AA. Update and improve SFPUC’s social media outreach and website to foster interaction and increase community awareness/education about SFPUC activities**
  - **(CY 6.5)** Percent of traffic increase in SFPUC social media platforms
  - **(S-A)**

- **SB. Advance outreach efforts in SFPUC communities, including possible new community partnerships**
  - **(CY 4.1)** Increase investments in community education and awareness
  - **(CY 4.3)** Number of adults and children reached through education programs as a percent of goals

- **CC. Foster engagement with current and developing stakeholder groups**
  - **(CY 6.2)** Percent of projects for which engagement is timely, effective, and for which stakeholder feedback is provided

#### Community Engagement

- **Engage SFPUC’s Public and Invest in Its Communities (Cont.)**

#### Community Benefits Program

- **SD. Develop Community Benefits Program**
  - **(CY 5.1)** Number of SFPUC procured construction projects with green jobs component
  - **(CY 5.2)** Number of procured construction hours worked that meet green job component requirements
  - **(CY 5.3)** Percent of procured hours worked through community-based employment

### DYNAMIC SECTION

<table>
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<tr>
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<th>Action</th>
<th>12 - 18 Month Target / Measure</th>
<th>Lead / Division</th>
<th>Completion Date</th>
<th>FY2010-11 Adopted Budget</th>
<th>FY2011-12 Adopted Budget</th>
<th>Proposed FY2012-13 Budget</th>
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</thead>
</table>

#### KPIs: Continuous progress on meeting objectives is measured through use of KPIs

- **S-A:**

- **A:** Annual

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### SFPUC Strategic Sustainability Plan FY2010–11

#### DURABLE SECTION

<table>
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<tr>
<th>Goal</th>
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<th>10-year Capital Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE. Advance positive employee relations through fair labor practices</td>
<td>(WP 1.2) Number of complaints filed regarding equal opportunity violations/discrimination</td>
<td>A</td>
<td>Develop and monitor grievance and administrative charges monitoring activities; coordinate delivery of training on improving team performance; ensure compliance with annual performance appraisal requirements; and implement state-mandated 4-tier training handling;</td>
<td>Rydaborn / BUS Srvcs</td>
<td>Quarterly &amp; Annual Reporting to the HR-Director and AGM of Business Services</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
</tr>
<tr>
<td>FF. Ensure employee health and safety and promote employee morale</td>
<td>(WP 4.2) Number of work-related fatalities; Recordable injury rate; Recordable lost time rate</td>
<td>S-A</td>
<td>Develop and implement enhanced driver safety program; implement OHM medical surveillance software; implement recommendations regarding asbestos safety.</td>
<td>Rydaborn / BUS Srvcs</td>
<td>Quarterly &amp; Annual Reporting to the HR-Director and AGM of Business Services</td>
<td>Existing Staff</td>
<td>Existing Staff</td>
</tr>
<tr>
<td>GG. Expand and improve internal communication</td>
<td>(GM 8.3) Percent of staff and management that rate internal communications efforts as good or better</td>
<td>A</td>
<td>Create a manual outlining formatting, grammatical, abbreviation standards for memos, letters, fact sheets, presentations and other PUC materials. Electronic and print distribution of annual employee performance guide completion and Popular annual report completion.</td>
<td>Ellis / EXT Affrs</td>
<td>Complete in FY2010-11</td>
<td>Complete in FY2010-11</td>
<td>Complete in FY2010-11</td>
</tr>
<tr>
<td>HH. Promote the professional development of staff, and ensure employees have clear expectations for performance</td>
<td>(WP 7.2) Percent of work force receiving performance reviews on an annual basis; (WP 8.1) Average hours of training per year per employee broken down by employee category</td>
<td>A</td>
<td>Complete Employee Development Plan components of the appraisal process, while also achieving 85% completion rate during FY2010-11 / 85% or greater completion rate of annual performance appraisals.</td>
<td>Rydaborn / BUS Srvcs</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
<td>Operating Budget</td>
</tr>
<tr>
<td>JJ. Advance workforce development for future leadership</td>
<td>(WP 9.1) Percent of staff expected to retire within 5 years. Identification of all-risk classifications and percent for which succession plan has been developed</td>
<td>A</td>
<td>Develop 2010 Employee Survey, including 'advances' made based on Prior Employee input from the last survey, then administer and report results to staff / Survey completed</td>
<td>Rydaborn / BUS Srvcs</td>
<td>Complete in FY2010-11</td>
<td>Complete in FY2010-11</td>
<td>Complete in FY2010-11</td>
</tr>
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#### Notes:
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- KPIs: Continuous progress on meeting objectives is measured through use of KPIs

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**SFPUC Strategic Sustainability Plan FY2010-11**
Appendix A

Background

San Francisco Public Utilities Commission
March 2011
# Table of Contents

**Appendix A: Background**

Executive Summary  
Introduction  
**How SFPUC Developed the Strategic Sustainability Plan**  
  Plan Framework — Durable and Dynamic Sections  
  Durable Section  
    Goals  
    Sustainability Categories  
    Objectives  
    Key Performance Indicators  
  Dynamic Section  
    Actions, Target/Measure, Lead, Completion Date and Budget  
**Reporting Protocol**  
  Mid-Year Performance  
  Annual Performance  
    Standards, Best Practices and Benchmarks  
    Normalizing Results  
    Performance Scale and Scoring  
    Biennial Performance and Framework Accounting  
**A Look into the Future**

**Appendix B**  
Glossary and Abbreviations/Acronyms

**Appendix C**  
Primary Sources for Key Performance Indicators

**Appendix D**  
Materiality Assessment

**Figures**  
A-1: SFPUC Strategic Sustainability Plan Sources  
A-2: SFPUC Strategic Sustainability Framework  
A-3: SFPUC Strategic Sustainability Performance Scale and Scoring  
A-4: SFPUC Strategic Sustainability Template for Profiling Annual Performance Scoring  
A-5: SFPUC Foresight Planning and the Strategic Sustainability Plan  
D-1: SFPUC Strategic Sustainability Overview of Method to Assess Materiality
Executive Summary

The San Francisco Public Utilities Commission (SFPUC) is a department of the City and County of San Francisco. It provides retail drinking water and sewer services to San Francisco, wholesale water to three Bay Area counties, and hydroelectric and solar power to San Francisco’s municipal departments. The SFPUC is comprised of three essential service utilities: Water, Power and Sewer. These functions are supported operationally by the Business Services, Infrastructure and External Affairs bureaus. One of forty-nine departments within the City of San Francisco, SFPUC has over 2,000 employees working in seven counties with a combined annual operating budget of over $700 million. SFPUC’s mission is:

To provide our customers with high quality, efficient and reliable water, power and sewer services in a manner that is inclusive of environmental and community interests and sustains the resources entrusted to the SFPUC’s care.

To further our mission, SFPUC has developed its Strategic Sustainability Plan. This Plan is a unique innovation in institutionalizing a sustainability plan by making it the core of our organization’s strategic management and planning. In summary:

SFPUC’s Strategic Sustainability Plan is a system for planning, managing and evaluating SFPUC-wide performance that takes into account the long term economic, environmental and social impacts of our business activities.

By integrating sustainability as the core of our strategic planning, we are now able to consider SFPUC-wide challenges more holistically and bring these considerations to bear in our decisionmaking. While the Strategic Sustainability Plan for each fiscal year focuses on a 12–18 month time frame, we will evolve and improve the elements of our strategic framework, including foresight planning for the longer term. This continuous improvement in implementation is critical to delivering the highest quality service to current and future generations while maintaining a safe and productive working environment for our employees.

SFPUC believes its Strategic Sustainability Plan will help our organization better manage and plan for the effects of our business activities across the triple bottom line (environment, economy and society) and become a model for strategic sustainability planning.

The Strategic Sustainability Plan:

• Embeds sustainability in decision-making, budgeting and planning at the SFPUC

• Provides a system by which SFPUC can manage and plan its services to customers as an environmentally, socially and financially strategic organization now and over the longer term

• Aids the SFPUC in its overall stakeholder engagement and communication

It is useful to note that the field of sustainability and its integration into strategic business planning is new and evolving quickly. As a result, the associated jargon can be confusing. SFPUC attempts to be clear in its language and to explain what we mean when using specific terms. For instance, for the SFPUC:

Sustainability is the framework through which we will responsibly manage the resources under our care, protect public health, and balance our social and environmental responsibilities to the citizens and community, while providing cost effective services to our ratepayers.

For this and other key terms and abbreviations we use in this report and in daily considerations of strategic and sustainability issues, please refer to our Glossary in Appendix B.

The following pages explain the rigorous development of our Strategic Sustainability Plan (SSP).
SFPUC’s Strategic Sustainability Plan (SSP) results from years of research, stakeholder engagement, and various forms of performance evaluation. Our Sustainability Baseline Assessment was completed in 2007. It evaluated and scored our performance for Fiscal Year 2005–06, and resulted from extensive interviews, data collection, analyses and active engagement with both internal and external stakeholders. SFPUC’s sustainability framework is adapted from similar frameworks used by many international organizations that publicly report on sustainability performance.

SFPUC’s Sustainability Plan and Program was completed in 2008 and is a culmination of these preceding activities. It identifies the strategies necessary to improve SFPUC’s Baseline sustainability performance, including specific initiatives, targets and actions.

In 2009, we undertook the task of integrating the 2008 Sustainability Plan and Program with our Strategic Action Plan that accounts on a fiscal year basis for the actions and targets of each of our divisions against SFPUC’s strategic goals. These multi-year efforts have resulted in the innovative integration of SFPUC’s sustainability and strategic plans and activities into the Strategic Sustainability Plan. It provides the following:

- A robust, comprehensive, SFPUC-wide framework to guide management and evaluation of the organization’s performance across the triple bottom line and strategic goals, objectives and actions.
- Systematic linkage to SFPUC’s budget cycles and decisions.
- Through the durable and dynamic sections of its strategic framework, a bridge to link short and long term planning, management and performance evaluation.
- Reconsideration each fiscal year of actions to achieve SFPUC’s longer term goals and objectives.
- A reliable reporting protocol to challenge SFPUC’s continuous performance toward our goals and objectives.
- Expert review and accounting on a biennial basis of the materiality of the Plan’s goals and objectives, use of best practices and key performance indicators (KPIs), and performance scale and scoring.

Figure A-1 shows the primary sources of the SSP.

Figure A-1: SFPUC Strategic Sustainability Plan Sources
How SFPUC Developed the Strategic Sustainability Plan

Plan Framework – Durable and Dynamic Sections

SFPUC created the Strategic Sustainability Plan with a focus on bridging long-term goals with daily actions; thus the division into a durable section and a dynamic section. The durable section will remain relatively constant as it highlights the SFPUC’s overarching goals and objectives. It also includes the key performance indicators we will use to measure progress on meeting the associated objectives.

The dynamic section will change annually at the fiscal year. Its components include the annual high level and priority actions management will focus on to meet the objectives, the 12–18 month targets for those actions and measures of whether targets were achieved, the division lead accountable for executing those actions, and associated timelines and budgets. We present more detail on each of these sections following Figure A-2.

The Strategic Sustainability Plan framework, shown on the following page in Figure A-2, will be evaluated biennially by an expert and impartial third party to ensure that it continues to cover the most material issues and important elements of SFPUC’s business activities, and that it is rigorous, responsive, and accurately measures performance.
SFPUC’s framework integrates the triple bottom line perspective through the 5 long term goals, 6 sustainability categories and over 30 objectives most material to the SFPUC. These comprise the durable section of the framework, called so because it drives management’s more dynamic, fiscal year choices of specific actions, targets and budgets that are intended to make continuous progress on the goals and objectives.

SFPUC’s Strategic Sustainability Plan is a system for planning, managing, and evaluating SFPUC-wide performance that takes into account the long term economic, environmental and social impacts of our business activities.
Durable Section

The durable section of the framework serves as the base for annual updates to the dynamic portion of the Strategic Sustainability Plan. The durable section consists of five goals, six sustainability categories, objectives, and key performance indicators. When the framework for the SSP is reviewed biennially, the review will include the durable section and all its components. The durable section, therefore, is not set in stone, but can evolve as SFPUC’s goals and objectives continue to develop. The durable section is as durable as it is useful.

Goals

SFPUC’s Sustainability Plan and Program goals are now consolidated with the five goals of the Strategic Sustainability Plan. They are:

- Provide High Quality Services
- Plan for the Future
- Promote a Green and Sustainable City
- Engage SFPUC’s Public and Invest in Its Communities
- Invest in SFPUC’s People

Sustainability Categories

The six sustainability categories of the Strategic Sustainability Plan are as follows:

- Governance and Management: Issues relating to organizational planning, management, effectiveness, accountability and financial health
- Customers: Issues relating to customers, rates and service standards
- Environment and Natural Resources: Issues relating to environmental impacts, and the use, protection, and health of natural resources
- Community: Issues relating to the SFPUC’s relationship and involvement with the community
- Workplace: Issues relating to human resource management, labor relations, health and safety
- Infrastructure and Assets: Issues relating to the management, reliability, and performance of assets and infrastructure

This component of the Strategic framework is a direct incorporation from SFPUC’s Sustainability Plan and Program. It incorporates the triple bottom line (environmental, economic and social) perspective that has become the dominant model for looking at sustainability and expands this notion by integrating it through the six categories most readily understood and applied within the SFPUC.

Objectives

The objectives of the Strategic Sustainability Plan are the result of further mapping and integrating the Sustainability Plan’s issues of concern with the objectives of the General Manager’s Strategic Action Plan.

To accomplish this with an eye on materiality, we evaluated these and potential additional objectives against the international standard for sustainability reporting or Global Reporting Initiatives (GRI) Guidelines, peer utility standards, and local, national, and international rules, regulations and standards. Subsequently, we screened for redundancy and assessed the remainder for materiality.

For this assessment of material issues and to arrive at the final set of objectives, we used the following criteria that we used previously in developing the framework for our Sustainability Plan and Program:

- Importance to SFPUC Division Leads
- Financial impact/risk
- Legal/regulatory issue
- Reported by peers
- Stakeholder issue
- Inclusion in the GRI Index

See Appendix D and Figure D-1 for an overview of the method used to assess the materiality of our SSP issues and objectives.

The importance of the durable section as a planning and management tool cannot be overstated. Each of the objectives is associated with one of the five strategic goals. The associated KPIs for each objective will be used to evaluate progress in meeting that objective and goal. It is in using this durable section as a guide, therefore, that Division Leads will consider the shorter term or fiscal year actions needed to make demonstrable progress against the longer term goals and objectives.
**Key Performance Indicators**

SFPUC will use its key performance indicators to report on progress against associated objectives. We will collect data semi-annually to support evaluation of and report on our performance.

It is important to emphasize that each KPI will be used to evaluate performance in meeting the associated objective in the durable section, not the associated action(s) in the dynamic section. It may help to consider the durable section the “end,” the dynamic section the “means.” In this case, we aim to fulfill our long term goals by reaching objectives and so our key performance indicators are focused on assessing our progress toward that end. Any fiscal year action to help meet an objective, therefore, should contribute to better performance as measured by the KPIs associated with that objective.

SFPUC’s Strategic Sustainability Plan KPIs are sourced from relevant international, national and local reporting and utility performance standards. They are for instance consistent with the guidelines of the Global Reporting Initiative which is the internationally recognized standard for sustainability reporting, and with indicators advocated by the American Water Works Association (AWWA) and other water and power utilities.

In order to re-examine and identify key performance indicators for this integration, SFPUC first pulled active indicators from its indicator bank created for the 2008 Sustainability Plan and Program. We also surveyed a variety of additional sources both for KPIs and for standards or best practices now included in our SSP, for instance:

- City Controller’s Citywide Performance Measurement System
- Credit rating criteria for SFPUC
- Industry association and peer-reported KPIs, including those for economic, environmental, and social issues related specifically to utilities industry
- Updated best practices in sustainability reporting

SFPUC selected KPIs based on the intent of each objective in the Strategic Sustainability Plan and its associated goal so that KPIs reflect the most material issues. Each KPI is associated with metrics and standards, or best practices, to allow for benchmarking performance. In addition, SFPUC continuously evaluates and revises KPIs as necessary to ensure their strength and utility. For instance, to the extent possible, KPI’s are quantitative, directional, measurable, specific, and actionable. However, in a case where no rigorous quantitative measure is available, SFPUC uses a qualitative KPI.

SFPUC catalogues remaining sustainability indicators that are not currently designated as Strategic Sustainability Plan KPIs and adds them to our existing bank. In this way, SFPUC continues to build its source of KPIs for potential use in future revisions as our strategic goals and objectives evolve. See the Reporting Protocol below for additional description of how the KPIs will be used in semi-annual and annual reporting.

**Dynamic Section**

In preparation for each fiscal year, SFPUC’s General Manager and the Division Leads work out discrete, high priority actions planned for the next year, 12–18 month targets for those actions and measures of whether targets were achieved, the Division Lead accountable for executing those actions, and the associated timeline and budget.

Now the integration provides a framework so that this important exercise will take place with the context of the durable section as guide to directly consider and associate fiscal year actions with SFPUC’s strategic goals and objectives. We anticipate that as the system evolves, the action and other components of the dynamic section will more holistically advance the goals and objectives of the durable section.

**Action, Target/Measure, Lead, Completion Date, and Budget**

As explained above, SFPUC’s Division Leads propose each of these components of the Strategic Sustainability Plan as part of their planning for the coming fiscal year. For the 12–18 month target, they provide a measure of progress on which to report at the half year mark, as well as a final completion date and a two-year budget amount. If money for this action is included in the 10-Year Capital Plan, it will be included. Again, as the Plan evolves, we anticipate these columns will be more informed and informative.

In sum, the integration of sustainability and strategic planning through a framework to guide, measure, and report on performance — and the clear link of performance data to the budget process — is a major step in driving SFPUC effectiveness and continuous improvement in its strategic planning and management.
In Fiscal Year 2008–09, SFPUC began quarterly and annual reporting on a sub-set of its sustainability indicators, with intent to report biennially on its entire Sustainability framework and performance. At the same time, we began annual reporting on our fiscal year Strategic Action Plan to facilitate accounting for each of SFPUC’s divisions’ activities against overall strategic goals.

With the integration of these activities into our Strategic Sustainability Plan, SFPUC will now evaluate and report progress semi-annually and evaluate and score our performance annually. In addition, the Strategic Sustainability Plan will be evaluated by an expert third party biennially not only to account for performance but to assure continuing materiality of the Plan’s goals and objectives, use of best practices and key performance indicators, and performance scale and scoring. Over time, this reporting protocol will provide us with credible trending data and build our capacity for foresight and longer term planning.

**Mid-Year Performance**

To track our progress on performance midway through each fiscal year, SFPUC will collect the data necessary to account in February for performance against the 12–18 month target of each action. This will include an accounting but no scoring of performance against the associated objectives and KPIs.

**Annual Performance**

Annually, we will take the additional step of scoring our performance against the associated KPIs for each objective and benchmarking our progress. Coincident with the annual performance evaluation in spring of each fiscal year and as mentioned above, SFPUC will review the dynamic section of its Strategic Sustainability Plan to reconsider priority actions needed in the coming fiscal year to make further progress toward related objectives including updating targets, completion dates and budget figures.

**Standards, Best Practices and Benchmarks**

To facilitate its performance evaluation, SFPUC measures the effectiveness of its performance against laws, rules and regulations, and industry standards, best practices and benchmarks from multiple sources such as the following:

- Applicable federal, state, and local laws, rules, regulations, ordinances and requirements: Applicable laws, regulations, etc., must be met in order to perform at an average level.

- American Water Works Association (AWWA): a non-profit association representing private and public water and wastewater utilities across the US. The AWWA runs the Qualserve Benchmarking program, which maintains performance data on 40 different indicators covering over 200 utilities from the US and Canada.

- International Benchmarking Network for Water & Sanitation Utilities (IB-NET): IB-NET is an international effort, launched by The World Bank, aimed at creating a central repository of performance data on water and wastewater utilities around the world.

- Other industry standards, benchmarks or best practices where applicable.

Using benchmarks, standards and best practices enables straightforward evaluation of the SFPUC’s relative performance. We will monitor and update them as part of our biennial performance and framework accounting.
Normalizing Results

To facilitate semi-annual evaluation and in order to improve benchmarking and tracking of trends in performance over the long-term, we have normalized data where appropriate. Normalizing data refers to the process of representing data against a driver or strongest determinant of performance.

For example, the amount of water distributed by the SFPUC is a driver that has a direct impact on the energy use of the organization. Thus, when looking at efficiency measures data can be presented as energy use per million gallons of water distributed. Normalizing data enables trends to be seen over time as they hold the variable operating factors constant.

Performance Scale and Scoring

To score its annual performance, SFPUC will use the generic performance scale developed for its Sustainability Baseline Assessment. Because data collection for each sustainability performance indicator can result in a variety of quantitative and qualitative forms, we developed a performance scale to enable a more consistent, methodical approach to data analysis and assessment.

Figure A-3 shows that each indicator is scored using an ordinal scale from 1 to 5, indicating progressive levels of performance. Each score represents the following:

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Significantly Below Average</td>
</tr>
<tr>
<td>2</td>
<td>Below Average</td>
</tr>
<tr>
<td>3</td>
<td>Average</td>
</tr>
<tr>
<td>4</td>
<td>Above Average</td>
</tr>
<tr>
<td>5</td>
<td>Significantly Above Average</td>
</tr>
</tbody>
</table>

- **Significantly Below Average**: Negative impacts or risks, performance significantly below peers. Score: 1.0–1.49
- **Below Average**: Subpar performance, potential for negative impacts and risks, performance worse than peers, or no data. Score: 1.5–2.49
- **Average**: Meets regulatory requirements, performance on par with peers, or sets baseline performance. Score: 2.5–3.49
- **Above Average**: Positive impact, positive performance in some aspects, performance better than peers. Score: 3.5–4.49
- **Significantly Above Average**: Very positive impacts, excellent performance, exemplary practice. Score: 4.5–5

Figure A-3: SFPUC Strategic Sustainability Performance Scale and Scoring
By using this scale, a relative score is assigned to the evaluation of performance for each indicator. This enables scores for all indicators associated with an SSP objective to be averaged together to establish an overall score. Note that qualitative indicators are not included in the overall score.

Note also that the term “average” in this report, which reflects a score of 3, does not refer to an industry average, but rather to average performance levels based on this relative scale from 1 to 5. When describing performance levels, therefore, SFPUC may use the phrase “below average” for scores less than 3 and the phrase “above average” for scores above 3.

We acknowledge that there is still a degree of subjectivity in our performance evaluation but this subjective factor will diminish once the SFPUC is able to monitor trends over time and secure third party verification of our performance results.

For a qualitative indicator that requires a subjective evaluation of performance, SFPUC will assume that enough information is available to provide a basis for an assessment and score. An example is the following: GM1.2 “Management is held accountable for project and division performance through audits and performance reports.” In this example, performance could be compared or benchmarked to SFPUC’s 2005–06 sustainability baseline to determine whether there has been an improvement in overall performance against the objective of increasing accountability. While the results for this indicator would be displayed, it would not be included in the overall annual scoring due to the limitations of qualitative indicators.

In a case where SFPUC is assessing data for the first time or for which there is no appropriate industry standard or existing trend data, we will use the initial data to establish a baseline. As we have in the past, we typically assign the resulting evaluations for such indicators a neutral score with the expectation that in future years the SFPUC can use the results to determine if performance is improving from the baseline year.

In the spring of 2011, SFPUC will initiate its reporting protocol with the report on our annual performance for Fiscal Year 2010–11. Figure A-4 provides a visual of the template we’ll use to create an annual performance profile. Each of the five goals of the Strategic Sustainability Plan is represented as one section of the circle; within each section, each objective has its own slice along with its associated sustainability category and KPIs.

The five inner circles will hold the resulting performance scores. The scoring target is “5”—the dark green bulls-eye. The score from 1–5 for each KPI will show as a bullet in one of the five inner circles. The scores for each slice will then be averaged and the relevant color of that average score entered in the appropriate inner circle for that slice. Over time as performance improves, the averaged annual score for each objective should move from 1 to 5, toward the dark green bulls-eye.
A. Ensure compliance with regulatory requirements
B. Enhance partnerships with City Departments, Agencies, & Raker Act entities
C. Provide high quality service to all customers, including customers who are most vulnerable to service interruptions
D. Foster customer satisfaction
E. Create agreements to support potential SFPUC customers due to developments in San Francisco
F. Drive accountability and transparency
G. Strengthen financial performance
H. Implement procurement, supply chain & contracting procedures to improve goods & services procured
I. Optimize relevant technological innovations
J. Optimize maintenance for water, wastewater & power assets
K. Improve capital facilities through construction
L. Align rate structure to reflect conservation, full costs of providing service & affordability
M. Enhance meter reading technology & billing accuracy
N. Optimize planning to meet water, wastewater & power demand
O. Advance strategic & sustainability planning, management & decision-making
P. Support and draft relevant public policy & legislative initiatives
Q. Develop & implement SFPUC-wide risk assessment & management
R. Advance security, emergency planning & response
S. Address climate change concerns, including adaptation & greenhouse gas mitigation
T. Diversify high quality water sources and advance water efficiency, conservation & reuse
U. Become a leader in environmental stewardship e.g. habitat, biodiversity & land management
V. Increase energy efficiency & conservation
W. Advance high quality & emissions-free power supply sources
X. Reduce inflows to the sewer system & ensure quality effluent.
Y. Reduce SFPUC in-house environmental impacts
Z. Promote environmental justice
AA. Update & improve SFPUC’s social media outreach & website to foster interaction & increase community awareness/education about SFPUC activities
BB. Advance outreach efforts in SFPUC communities, including possible new community partnerships
CC. Foster engagement with current & developing stakeholder groups
DD. Develop Community Benefits Program
EE. Enhance positive employee relations through leadership practices
FF. Ensure employees have an understanding of SFPUC’s mission & vision
GG. Expand & improve internal communication
HH. Promote the professional development of staff & ensure employees have clear expectations for performance
JJ. Advance workforce development for future leadership
Biennial Performance and Framework Accounting

On a biennial basis, SFPUC will conduct an impartial and expert sustainability accounting of our Strategic Sustainability Plan to assure its continuing materiality, inclusiveness, responsiveness, and rigor. This comprehensive assessment of our SSP framework and its implementation will evaluate both its durable and dynamic sections, and will for instance test the continuing materiality of the goals, objectives and KPIs. It will evaluate the effectiveness of the Plan to link its budgeting to value creation and to drive better long term decisionmaking.

It is critical to the long term rigor, effectiveness and credibility of SFPUC’s Strategic Sustainability Plan that the biennial evaluation be an impartial and expert review of the framework and a thorough accounting of SFPUC’s performance evaluation(s), scale and scoring, and reporting.

With its Strategic Sustainability Plan, SFPUC is positioned as a leader in integrating sustainability’s triple bottom line into organization-wide management, decisionmaking and performance evaluation and reporting. Over time, this integration will build our capacity for longer term trend analysis and foresight planning.

A Look into the Future

Figure A-5 is a stylized presentation of potential longer term strategic activities that might be undertaken with improved trend analysis.

This longer term planning would challenge SFPUC to envision the future more deeply and creatively, to scan and inventory longer term risks, uncertainties and opportunities, and to build the outcomes into its Strategic Sustainability Plan.

SFPUC will continue to invest in this rigorous integration of our sustainability and strategic planning as fundamental to our commitment to provide quality service to our current customers, staff and community while managing the resources for continuous quality service to future generations.

Figure A-5: SFPUC Foresight Planning and the Strategic Sustainability Plan

Foresight planning possible in future phases of strategic sustainability planning ▼ Currently included in SFPUC’s Strategic Sustainability Plan ▼
This appendix provides a glossary of terms and abbreviations used in the Strategic Sustainability Plan, the four SFPUC sustainability reports available at www.sfwater.org/sustainability, and in daily considerations of SFPUC’s strategic and sustainability issues:

**Glossary**

**Asset management:** Defined by the EPA as “managing infrastructure capital assets to minimize the total cost of owning and operating them, while delivering the service levels customers desire.”

**Average performance:** An SFPUC annual strategic performance score of 3 refers to an average performance level based on SFPUC’s relative scale from 1 to 5. It does not refer to an industry average. When describing performance levels, therefore, SFPUC may use the phrase “below average” for scores less than 3 and the phrase “above average” for scores above 3.

**Baseline assessment:** Evaluation of performance in a baseline year that serves as a starting point for future evaluation of performance and long term review of trends.

**Benchmarking:** The process by which organizations evaluate their performance in relation to best practice within their own sector, or against their own past performance.

**Best Practice:** An activity or procedure that has produced outstanding results in another situation (or organization) and could be adapted to improve effectiveness, efficiency, ecology, innovation, etc. in another situation (or organization).

**Biodiversity:** The variability among living organisms within species, between species, and between ecosystems. (Source: World Resources Institute)

**California Independent System Operator (CAISO):** The California ISO is a not-for-profit public-benefit corporation charged with operating the majority of California’s high-voltage wholesale power grid. Balancing the demand for electricity with an equal supply of megawatts, the ISO is the impartial link between power plants and the utilities that serve more than 30 million consumers. The ISO provides equal access to the grid for all qualified users and strategically plans for the transmission needs of this vital infrastructure.

**Ecosystem:** A dynamic complex of plant, animal, and micro-organism communities and their nonliving environment interacting as a functional unit.

**Environmental Justice:** (various definitions) California EPA (CA Gvt. Code Section 65040.12), SFE 2005, and SFPUC CAC 2007 Resolution: The fair treatment of people of all races, cultures, and incomes with respect to the development, adoption, implementation, and enforcement of environmental laws and policies.

**Foresight Planning:** Active monitoring of key uncertainties, technologies, trends, megatrends and events that could create opportunities and risks.

**Indicator:** One of a type of measure used to determine, over time, performance of a defined process, or function, or achievement of a defined outcome.

**International Organization for Standardization (ISO):** The world’s largest developer and publisher of International Standards. ISO is a network of the national standards institutes of 157 countries, one member per country, with a Central Secretariat in Switzerland that coordinates the system. Standards ensure desirable characteristics of products and services such as quality, environmental friendliness, safety, reliability, efficiency and interchangeability — and at an economical cost.

**Material Issue:** An issue that will influence the decisions, action and performance of an organization or its stakeholders.

**Materiality:** Refers to the degree to which an issue could make a major difference to an organization’s performance. According to AccountAbility, “material information provides the basis for stakeholders and management to make sound judgments about the
things that matter to them, and take actions that influence the organization’s performance." For further information, see www.accountability21.net.

**Normalization:** A means of standardizing data to a particular measure of activity (e.g. MGD water delivered), such that true performance can be seen over time independent of variance in activity levels. “As a general rule, normalization should be based on levels of production at a facility. Production may refer to manufactured product, services rendered or delivered, or some other productive output from the facility.” (Source: USEPA)

**Stakeholders:** Those individuals and groups that affect and/or are affected by the organization and its activities. (Source: AccountAbility Assurance Standard 2003)

**Standards:** Policies, regulations, measures or practices that establish an industry norm; standards are established typically by authority, custom, or general consent.

**Strategic Business Plan:** A tool for making resource allocation decisions among core business functions, and investments in expanding and/or diversifying business functions, in a way that positions the utility to increase value to customers/shareholders. (Source: AwwaRF 2003)

**Strategic Sustainability Plan:** For the SFPUC, a system for planning, managing and evaluating SFPUC-wide performance that takes into account the long term economic, environmental and social impacts of our business activities.

**Strategic Sustainability Planning:** The process of identifying an organization’s long-term goals, determining the best triple bottom line approach for achieving those goals and allocating adequate resources (including capital and people) for implementation.

**Sustainability:** For the SFPUC, the framework through which it will responsibly manage the resources under its care, protect public health and balance its social and environmental responsibilities to the citizens and community, while providing cost effective services to its ratepayers.

**Sustainability Performance:** An organization’s total performance, which include its policies, decisions, and actions that create social, environmental and/or economic (including financial) outcomes. (Source: AccountAbility Assurance Standard 2003)

**Sustainability Plan:** For the SFPUC, see our 2008 Sustainability Plan and Program at www.sfwater.org/sustainability, and see Strategic Sustainability Plan above.

**Sustainability Planning:** The process of identifying key priorities, actions, targets, responsibilities, resources and timetable for a business or organization to implement its environmental, economic, and social strategies for improving overall performance.

**Sustainability Reporting:** The act of publicly reporting on environmental, social, and economic management and performance toward a goal of sustainable development. The internationally recognized standards are the Global Reporting Initiative’s Sustainability Reporting Guidelines and AccountAbility’s AA1000 Assurance Standard.

**Sustainable Development:** Defined in the 1987 Brundtland Report (“Our Common Future”) as development that “meets the needs of the present without compromising the ability of future generations to meet their own needs.”

**Triple Bottom Line:** Refers to broadening the traditional bottom line perspective for evaluating business performance that is focused solely on financial performance to take into account the environmental and social impacts associated with business activities. The term “triple bottom line” is attributed to John Elkington, co-founder of the UK based consultancy SustainAbility.

**Triple Bottom Line Reporting:** Systematic management, performance, improvement and public disclosure in environmental, economic, and social dimensions at local, regional, and global scales. (Source: AwwaRF 2007)

**Visioning:** Stepping through what is required of an organization in terms of re-aligning goals and strategies, objectives and targets for a number of alternative futures and/or for a preferred future state; can include risk convergence.
Abbreviations/Acronyms

AGM: Assistant General Manager
AMI: Advanced Metering Infrastructure
AMWA: Association of Metropolitan Water Agencies
APWA: American Public Works Association
AWWA: American Water Works Association
BAAQMD: Bay Area Air Quality Management District
BAWSCA: Bay Area Water Supply and Conservation Agency
BLS: Bureau of Labor Statistics
CAC: Citizens’ Advisory Committee
CAISO: California Independent System Operator
CAP: Climate Action Plan
CAP: Community Assistance Program
CBA: Collective Bargaining Agreement
CCA: Community Choice Aggregation
CCSF: City and County of San Francisco
CEQA: California Environmental Quality Act
CIP: Capital Improvement Program
CIP: Community Investment Program
CT: Combustion Turbine
Cu. ft.: Cubic feet
CPUC: California Public Utilities Commission
DDA: Deferred & Deviation Accounts
DHR: Department of Human Resources (CCSF)
DMRP: Dental Mercury Reduction Program
DPW: Department of Public Works (CCSF)
EJ: Environmental Justice
EBMUD: East Bay Municipal Utility District
EBRPD: East Bay Regional Parks District
EMS: Environmental Management System
EOP: Emergency Operations Plan
EPA: Environmental Protection Agency
ERP: Electricity Resource Plan
ESG: External Stakeholders Group
FOG: Fats Oils and Grease
FTE: Full-Time Equivalent
GHG: Greenhouse Gases
GM: General Manager
GRI: Global Reporting Initiative
HCP: Habitat Conservation Plan
HR: Human Resources (SFPUC)
HRC: Human Rights Commission
IB-NET: International Benchmarking Network for Water and Sanitation Utilities
IHA: International Hydropower Association
ISO: International Organization for Standardization
ISO: Independent System Operator
IT: Information Technology
KPI: Key Performance Indicator
KW: Kilowatt
KWh: Kilowatt hours
LMS: Learning Management System
MEA: Municipal Executives’ Association
MGD: Million Gallons per Day
ML: Million Liters
MOU: Memorandum of Understanding
MW: Megawatt
MWh: Megawatt hour
O&M: Operations & Maintenance
OSHA: Occupational Safety & Health Administration
PEER: Public Entity EMS Resource
PEIR: Program Environmental Impact Report
PG&E: Pacific Gas & Electric
PV: Photovoltaic
RCD: Resource Conservation District
RFP: Request for Proposals
RFQ: Request for Qualifications
R&R: Repair & Replacement
ROA: Return on Assets
ROW: Right of Way
SFE: Department of the Environment (CCSF)
SFPUC: San Francisco Public Utilities Commission (CCSF)
SSG: Sustainability Strategy Group
SSIP: Sewer System Improvement Program
SSMP: Sewer System Master Plan
SSP: SFPUC’s Strategic Sustainability Plan
TBD: To Be Determined
TBL: Triple Bottom Line
UK: United Kingdom
WEF: Water Environment Federation
WSIP: Water System Improvement Program
WSPP: Western Systems Power Pool
WUCA: Western Utility Climate Alliance
WWTP: Wastewater Treatment Plant
APPENDIX C
PRIMARY SOURCES FOR KEY PERFORMANCE INDICATORS

SFPUC consulted with an expert third party, Arup, to evaluate leading sources as part of a comprehensive review of industry benchmarks, targets, and best practices for inclusion in the Strategic Sustainability Plan. Many of SFPUC’s KPIs are based on those advocated by the following:

Global Reporting Initiative (GRI)
The GRI produces one of the world’s most prevalent standards for sustainability reporting, also known as triple bottom line (TBL) reporting. Sustainability reporting is the act of reporting an organization’s performance across economic, environmental, and social dimensions toward the goal of sustainable development.

As of January, 2009, more than 1,500 organizations from 60 countries use the Guidelines to produce their sustainability reports.

The GRI G3 (third generation) reporting framework provides universal guidance regarding principles of good reporting and disclosure items, including performance indicators. The principles help reporters define the report content and the quality of the report, and give guidance on how to set the report boundary. Principles include those such as materiality, stakeholder inclusiveness, comparability and timeliness. Disclosure items include disclosures on management of issues, as well as performance indicators themselves (e.g. “total water withdrawals by source.”)

The GRI guidelines contain 79 indicators across environmental, social, and economic categories, in addition to sector supplements. Currently, there is an electric utilities sector supplement but no current water utilities sector supplement.

In developing its Strategic Sustainability Plan and in anticipation of preparing an annual report of sustainability performance that is compliant with GRI, the SFPUC relied on the GRI guidance and followed its best practices in engagement, materiality assessment, comparability, and consideration of indicators.

www.globalreporting.org

American Water Works Association (AWWA)
AWWA is a non-profit association representing private and public water and wastewater utilities across the US. The AWWA runs the Qualserve Benchmarking program, which maintains performance data on 40 different indicators covering over 200 utilities from the US and Canada. The SFPUC, in developing its Strategic Sustainability Plan, relied on the AWWA indicators as a basis for developing its performance indicators.

www.awwa.org

Water UK
Water UK is an industry association that collects sustainability performance data on 24 water and wastewater operators in the UK. Water UK annually collects data and presents averages across the 24 utilities in an annual report. The SFPUC, in developing its Strategic Sustainability Plan, reviewed the Water UK performance data as a basis for the standards and metrics for its performance indicators.

www.water.org.uk

International Benchmarking Network for Water & Sanitation Utilities (IB-NET)
IB-NET is an international effort, launched by The World Bank, aimed at creating a central repository of performance data on water and wastewater utilities around the world. The SFPUC, in developing its Strategic Sustainability Plan, reviewed the IB-NET performance data as a basis for the standards and metrics for its performance indicators.

www.ib-net.org
**Peer Utilities and Leading GRI Reporters**

The inclusion of benchmarks, standards and best practices from peer utilities enables straightforward evaluation of the SFPUC’s relative performance. Peer utilities reviewed include:

- GE ([www.ge.com](http://www.ge.com))
- Tennessee Valley Authority ([www.tva.gov](http://www.tva.gov))
- United Utilities ([www.unitedutilities.com](http://www.unitedutilities.com))
- Eugene Water and Electric Board ([www.eweb.org](http://www.eweb.org))
- Seattle Public Utilities ([www.cityofseattle.net/util](http://www.cityofseattle.net/util))
- Austin Water ([www.ci.austin.tx.us/water](http://www.ci.austin.tx.us/water))
- Portland Water Bureau ([www.portlandonline.com/water](http://www.portlandonline.com/water))
- EDF Energy UK ([www.edfenergy.com](http://www.edfenergy.com))
- United Technologies Corporation ([www.utc.com](http://www.utc.com))

**Industry Best Practices**

A useful 2008 resource for industry best practices resulted from the EPA collaboration: “Effective Utility Management: A Primer for Water and Wastewater Utilities.” It presents a stepwise approach to utility performance management from assessing current conditions to ranking and determining the importance of performance attributes (measures), selecting performance attributes (measures), and developing an improvement plan. Collaborators producing this report include:

- Association of Metropolitan Water Agencies (AMWA)
- American Public Works Association (APWA)
- American Water Works Association (AWWA)
- National Association of Clean Water Agencies (NACWA)
- National Association of Water Companies (NAWC)
- United States Environmental Protection Agency (EPA)
- Water Environment Federation (WEF) ([www.water.EPA.gov](http://www.water.EPA.gov))
APPENDIX D
MATERIALITY ASSESSMENT

Arup also conducted a materiality assessment of the Strategic Sustainability Plan objectives in the durable section. The purpose was to ensure that SFPUC includes in its Strategic Sustainability Plan and evaluates on an ongoing basis those issues or topics most relevant to reaching its goals. The assessment included two primary sources for the Plan’s objectives, the outcomes from SFPUC’s Strategic Action Plan and the issues or subcategories from SFPUC’s 2008 Sustainability Plan and Program. The materiality assessment included the following:

- Gap analysis of objectives: A gap analysis compared the objectives to topic areas presented by peer utilities and GRI indicator topic areas, as well as any internal SFPUC long term goals or obligations as identified by SFPUC.
- Redundancy screen: Overlap occurred because the objectives were pulled primarily from two separate plans. To address the overlap, Arup created a redundancy screen to pair up similar objectives, outcomes and subcategories and then synthesized a single objective based on similar inputs.
- Re-framing language into durable framework: This step focused on re-framing the language of each objective into action statements at the appropriate level of specificity. Too broad an objective would not serve as guidance in identifying future actions and other dynamic components of the framework, while too narrow an objective would too severely limit the scope.
- Materiality check across 6 criteria: Six criteria provided the basis for the materiality assessment of the objectives. These six are consistent with those used for the same purpose in developing the 2008 Sustainability Plan and Program — see Figure D-1.
- Weighted scoring of the 6 criteria: Each of the six criteria was assigned a weight based on input from SFPUC as to relative priority/importance of that criterion in determining materiality. The scores for each objective were summed across the six criteria to yield its weighted score.

Figure D-1 provides an overview of the method to assess materiality.

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**Figure D-1: SFPUC Strategic Sustainability Overview of Method to Assess Materiality**

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<th>OBJECTIVES</th>
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<th>Step 2</th>
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Inclusion in the GRI Index  
Importance to AGMs  
Financial impact/risk  
Legal/regulatory issue  
Reported by peers  
Stakeholder issue  
Weighted score