



City of Portland
Bureau of
**Planning and
Sustainability**

Sam Adams, Mayor
Susan Anderson, Director

Planning

1900 S.W. 4th Ave., Ste. 7100
Portland, OR 97201-5350

Phone 503-823-7700
FAX 503-823-7800
TTY 503-823-6868

Sustainability

721 N.W. 9th Ave., Ste. 350
Portland, OR 97209-3447

Phone 503-823-7222
FAX 503-823-5311
TTY 503-823-6868

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M E M O

January 14, 2011

To: Financial Planning Division, OMF
Mayor Adams
Comm. Fritz
Comm. Fish
Comm. Leonard
Comm. Saltzman
City Auditor Griffin-Valade

From: Susan Anderson, Director 
Bureau of Planning and Sustainability

Subject: Winter BuMP – Bureau of Planning and Sustainability

With this cover memo I am conveying materials that comprise our submittal for the Winter BuMP FY 2010-11 for the Bureau of Planning and Sustainability and the Solid Waste Management Fund.

Thanks.

BUDGET DECISIONS

Reductions in General Fund Resources

To achieve the required 4% reduction (\$295,650) in General Fund resources, the bureau re-aligned its base budget by generating salary savings by changing the use of six Council-authorized positions, cutting a permanent 0.5 FTE Data Analyst and reducing core funding for contracts. It also replaced \$135,000 of General Fund ongoing revenue with revenues from external sources including grants and intergovernmental agreements related to Solid Waste and Recycling. The result is a bare-bones budget which BPS believes will still be able to accomplish the core mission and programs of the bureau.

Winter BuMP Update:

The changes outlined in this decision package have been implemented. No further action is required by the bureau.

One-Time City Funding for Planning Programs and Projects

While the overall BPS budget includes a diversified mix of funding sources, the bureau has historically relied on General Fund resources for a significant portion of its planning programs. For years, the level of ongoing General Fund support has been notably lower than what's needed to carry out the work plan. The Adopted Budget FY 2010-11 approves the following amounts of one-time resources to enable the bureau to carry out these high priority programs:

- Portland Plan and Central Portland Plan - \$800,000 (General Fund)
- Youth Planning Program - \$70,522 (General Fund)
- River Plan - \$167,316 (BES interagency revenue)

Winter BuMP Update:

Work progressed on all three of these projects. Portland Plan completed Phase 2 setting goals and objectives and is preparing for Phase 3 public workshops on the draft portland plan strategies scheduled for March 2011.

Youth Planning program completed work with the Summer and Fall group of youth interns focused on work in support of the Portland Plan.

River Plan completed adoption of the North Reach River Plan, participated in responding to the appeals filed by industrial interests and started work on the Central Reach River Plan. River Plan staff have also been working closely with the Office of Healthy Working River on their workplan and a River Issues forum to be held in February 2011.

Revenues from Outside Agencies and Organizations

The FY 2010-11 Adopted Budget for the Bureau of Planning and Sustainability reflects funding from external agencies for bureau programs and projects:

- West Hayden Island (Port) - \$322,000
- Airport Futures (Port) - \$120,848
- Central Portland Plan (PDC)- \$475,000
- Planning grants (various) - \$188,096
- Metro - \$851,000
- Sustainability grants (various) - \$605,243

Winter BuMP Update:

The adjustments were submitted in Fall BuMP to reflect the amount agreeable by the City and agencies.

Solid Waste Management Fund initiatives

BPS' Adopted Budget reflects funding for the following projects with resources arising from an increase in the commercial tonnage fee charged to solid waste generated by businesses and a one-time use of the Solid Waste Management Fund reserves.

Durable Lunch Trays for Portland Schools - \$70,000
Public Recycling Containers - \$387,450
Portland Recycles Phase II - \$450,000

Winter BuMP Update:

BPS has entered into an Intergovernmental Agreement with Portland Public Schools and has paid PPS \$70,000 to purchase durable lunch trays. Design and initial procurement work on the public recycling containers is now complete, and the fabrication of the containers is currently underway. The first containers should be installed in March 2011. Phase II of the Portland Recycles Plan focuses on residential curbside food-scrap collection. A 2,000 home pilot is underway and showing promise, though the timeline for Citywide rollout of the program has been delayed due to slow progress in private firms locating transfer facilities in Portland.

BUDGET NOTES

The FY 2009-10 Adopted Budget temporarily suspends funding from the Bureau of Development Services for the Regulatory Improvement Code Amendment Package program in the Bureau of Planning and Sustainability. Funding for the program will be reexamined as part of the FY 2010-11 budget process.

Winter BuMP Update:

Staff worked on completing remaining RICAP projects focused on a package of amendments related to solar panels.

FALL BuMP REQUESTS

PN_004 West Hayden Island IGA

Increase budget appropriation by \$70,000 from \$322,000 to \$392,000 and recode to appropriate fund center/functional area.

Winter BuMP Update:

The changes outlined in this request have been implemented. No further action is required by the bureau.

PN_006 Outer Power IA w/ PBOT

Appropriate \$16,310 in interagency agreement with PBOT for the Outer Power Project.

Winter BuMP Update:

The changes outlined in this request have been implemented. No further action is required by the bureau.

PN_010 EECBG/ARRA Clean Energy Work Grant

Appropriate grants to support BPS staff and contract with Clean Energy Works Oregon, Inc. to deliver high-quality job creation, energy savings and carbon reductions through the expansion of Clean Energy Works Portland to jurisdictions around Oregon.

Winter BuMP Update:

BPS has entered into grant agreements with Clean Energy Works Oregon, the new non-profit, to carry out major efforts to improve energy efficiency in homes. The work is on track to assist 1,000 by June 30, 2011.

PN_028 Encumbrance Carryover/Contracts

Encumbrance carryover to support BPS contracts committed in FY 2009-10.

Winter BuMP Update:

The changes outlined in this request have been implemented. No further action is required by the bureau.

SERVICE IMPROVEMENT PLAN

BPS Internal Strategic Plan

The bureau is committed to build on progress it has made to date in creating a shared focus for the bureau out of the merger of OSD and Planning. By the fall of 2009, the bureau will develop a strategic plan, defining a single mission for the new organization. The bureau will identify ways to better accomplish this mission by leveraging the bureau's expertise, skills, resources, programs, staff and constituencies.

Winter BuMP Update:

The BPS strategic plan is complete. At the January 2011 bureau all-staff meeting, the communications consultants and internal communications team presented the new branding identity, and the final document is crafted and ready to be printed as of January 14, 2011. The document, which covers 2011 to 2013, outlines BPS' mission, values, goals, and programmatic work. It will soon be shared with bureau partners via an outreach campaign as well as at meetings such as the Planning and Development Directors meeting. BPS leadership will then work with staff on the next phase of the strategic plan, internalizing the stated values as overarching principles of how the bureau does its work on a day-to-day basis, both internally and externally.

New approaches to address "equity" in the work of BPS.

Sustainability is often described in terms of three elements: economy, environment and equity. The work of BPS has long involved all three of these elements, but the Portland Plan creates the need and opportunity to find new means to consider equity impacts in the City's policies and decisions. The bureau will take the opportunity of the Portland Plan to develop new ways to incorporate equity considerations in comprehensive plan decisions.

Winter BuMP Update:

Work with the DCL partners on the Portland Plan is continuing. This group as well as the directors of the city's neighborhood coalitions are being consulted on the design of the comprehensive plan update process, which will be the Bureau's main implementing action for the Portland Plan commencing in FY 2011-12.

Equity has emerged as an overarching theme and objective of the Portland Plan strategies. The Bureau has been working with a group of city and non-profit groups to develop this strategy including actions the city will undertake in the next five years.

Commercial Waste Reduction and Recycling Assistance

In FY 2009-10, BPS will significantly increase its outreach to businesses to assist them in complying with Portland's new requirement to recycle 75% of solid waste. BPS will contact more than 20,000 businesses and proactively offer assistance to 900 of the largest sources of waste.

Winter BuMP Update:

Business Assistance program completed a third-party program evaluation in fall 2010. Based on these findings, the business recycling requirement aspects of the assistance program will be restructured and re-launch in summer 2011. The business assistance team currently provides technical assistance to individual businesses in an effort to help them meet and/or exceed the City's recycling requirements. Portland's recovery rate for the commercial sector has increased to 67 percent.

Business Area Projection Report

	Winter BuMP Revised Budget	FY 2010-11 Year to Date Actuals	Winter BuMP Year-End Projection	% of Projected Actuals to Revised Bud
Bureau of Planning and Sustainability				
EXPENDITURES				
Personal Services	\$7,192,940	\$3,284,250	\$7,251,197	101%
External Materials and Services	\$1,044,275	\$211,140	\$1,044,275	100%
Internal Materials and Services	\$1,375,057	\$899,847	\$1,375,057	100%
TOTAL EXPENDITURES	\$9,612,272	\$4,395,236	\$9,670,529	101%
REVENUES				
Charges for Services	\$0	\$94	\$200	0%
Intergovernmental Revenues	\$1,100,986	\$186,994	\$1,100,786	100%
Interagency Revenue	\$297,547	\$51,499	\$297,547	100%
Miscellaneous	\$10,000	\$4,893	\$10,000	100%
General Fund Discretionary	\$8,050,789	\$0	\$8,109,046	101%
General Fund Overhead	\$152,950	\$0	\$152,950	100%
TOTAL REVENUES	\$9,612,272	\$243,479	\$9,670,529	101%

Bureau Projection Narrative

Personal Services - The projected year-end expenses will be within the budgeted amount. The variance will be covered by GF compensation set aside. Adjustments will be made in the next two months to code personnel expenses thru 12/31/10 to appropriate funds and cost objects.

Fund Projection Report

	Winter BuMP Revised Budget	FY 2010-11 Year to Date Actuals	Winter BuMP Year-End Projection	% of Projected Actuals to Revised Bud
Solid Waste Management Fund				
EXPENDITURES				
Unappropriated Fund Balance	\$1,887,499	\$0	\$2,002,047	106%
Personal Services	\$1,779,186	\$663,003	\$1,777,014	100%
External Materials and Services	\$2,202,188	\$253,857	\$1,941,188	88%
Internal Materials and Services	\$1,407,264	\$100,192	\$1,407,264	100%
Bond Expenses	\$37,063	\$8,330	\$37,063	100%
Fund Transfers - Expense	\$235,601	\$60,240	\$235,601	100%
TOTAL EXPENDITURES	\$7,548,801	\$1,085,622	\$7,400,177	98%
REVENUES				
Budgeted Beginning Fund Balance	\$3,309,128	\$0	\$3,309,128	100%
Licenses & Permits	\$2,508,815	\$25,609	\$2,417,500	96%
Charges for Services	\$1,606,440	(\$12,059)	\$1,551,000	97%
Intergovernmental Revenues	\$0	\$0	\$0	0%
Interagency Revenue	\$60,000	\$8,419	\$60,000	100%
Miscellaneous	\$64,418	\$13,309	\$62,549	97%
TOTAL REVENUES	\$7,548,801	\$35,278	\$7,400,177	98%

Fund Projection Narrative

External M&S - about \$261K budgeted for Portland Recycles Phase II will be spent in FY 2011-12 instead of FY 2010-11.