



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

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M E M O

April 18, 2011

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

From: Mayor Sam Adams

Subject: Spring BuMP – Bureau of Planning and Sustainability

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

Thanks,

A handwritten signature in black ink, appearing to read "S.A.M.".

BUDGET AMENDMENT REQUEST

Bureau of Planning and Sustainability

PERIOD Spring BuMP

FISCAL YEAR FY 2010-11

PN_033 - IA w/ BES for Revegetation

Provide technical support and purchase "Feature Analyst" GIS software for the Watershed Revegetation program.

Dollar Amount: \$15,000
Type: New Request
Resources: New Revenues

PN_034 - GIF IA w/ BES

Appropriate IA w/ BES to support GIF projects committed in prior years and payments made in 2010-11.

Dollar Amount: \$132,000
Type: New Request
Resources: New Revenues

PN_035 - Cash Transfer w/ PBOT for Clean Energy

Appropriate cash transfer with PBOT for the Clean Energy project.

Dollar Amount: \$97,888
Type: New Request
Resources: New Revenues

PN_036 - Oregon DLCD Periodic Review Grant

True up Oregon DLCD Periodic Review grant to match actual carryover in various expense categories.

Dollar Amount: \$27,806
Type: Technical Adjustment
Resources: Grants

PN_037 - Budget adjustments for BPS move

Request budget adjustments in OMF IA w/ Facilities and BTS to cover move expenses from EcoTrust to 1900 Building.

Dollar Amount: \$150,000
Type: New Request
Resources: New Revenues

BUDGET AMENDMENT REQUEST

Bureau of Planning and Sustainability

PERIOD Spring BuMP

FISCAL YEAR FY 2010-11

PN_038 - Dishman project funded by ARRA EECBG

Transfer budget appropriation to Parks for the Dishman project funded by ARRA EECBG - Solar Facilities (PN00050001).

Dollar Amount: **(\$300,000)**

Type: Technical Adjustment

Resources: Grants

PN_039 - IA w/ PBOT for Cully TGM project

Appropriate IA w/ PBOT for the Cully TGM project funded by ODOE Grant (PN000026).

Dollar Amount: \$30,000

Type: New Request

Resources: Grants

PN_040 - Grant appropriation for PMLRT project

Request grants appropriation for the PMLRT project (TR000094).

Dollar Amount: \$10,000

Type: Technical Adjustment

Resources: Grants

PN_041 - IA w/ PBOT for Columbia River Crossing project

Appropriate IA w/ PBOT for services provided by BPS for the Columbia River Crossing project.

Dollar Amount: \$14,680

Type:

Resources:

PN_042 - Request additional GF appropriation from COLA

Request additional GF support from comp. set aside to cover cost of living increase in FY 2010-11.

Dollar Amount: \$58,257

Type: New Request

Resources: General Fund Discretionary

BUDGET AMENDMENT REQUEST

Bureau of Planning and Sustainability

PERIOD Spring BuMP

FISCAL YEAR FY 2010-11

PN_043 - Green Development Resource Center Grant

Reduce budget appropriation in grant ID PN000010 due to grant ended in FY 2009-10.

Dollar Amount: **(\$82,000)**

Type: Technical Adjustment

Resources: Grants

PN_044 - IA w/ BES to support BEST Business Center

Appropriate IA w/ BES to support BEST Business Center.

Dollar Amount: \$5,000

Type: New Request

Resources: New Revenues

Business Area Projection Report

	Spring BuMP Revised Budget	FY 2010-11 YTD Actuals Thru AP8	Spring BuMP Year-End Projection	% of Projected Actuals to Revised Bud
Bureau of Planning and Sustainability				
EXPENDITURES				
Personal Services	\$7,265,877	\$4,989,147	\$7,265,877	100%
External Materials and Services	\$1,185,677	\$738,419	\$1,185,677	100%
Internal Materials and Services	\$1,496,543	\$1,535,611	\$1,496,543	100%
TOTAL EXPENDITURES	\$9,948,097	\$7,263,177	\$9,948,097	100%
REVENUES				
Charges for Services	\$0	\$166	\$250	0%
Intergovernmental Revenues	\$1,250,986	\$278,271	\$1,227,236	98%
Interagency Revenue	\$327,227	\$148,766	\$327,227	100%
Fund Transfers - Revenue	\$97,888	\$0	\$97,888	100%
Miscellaneous	\$10,000	\$16,793	\$33,500	335%
General Fund Discretionary	\$8,109,046	\$0	\$8,109,046	100%
General Fund Overhead	\$152,950	\$0	\$152,950	100%
TOTAL REVENUES	\$9,948,097	\$443,996	\$9,948,097	100%

Bureau Projection Narrative

General Fund

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 to code personnel expenses thru 03/31/11 to appropriate funds and cost objects.

Internal Materials and Services – The actual expenses thru AP8 will be adjusted to include bureau overhead credit from Solid Waste Management Fund. BPS anticipates to spend the budgeted amount.

Grants Fund

Personal Services – the projected year-end cost is lower than anticipated and the remaining amount will be carried over into FY 2011-12 to continue several of the multi-year grants.

External and Internal Materials and Services – The projected expenses is lower than budgeted and the remaining amount will be carried over into FY 2011-12 to continue several of the multi-year grants.

Fund Projection Report

	Spring BuMP Revised Budget	FY 2010-11 YTD Actuals Thru AP8	Spring BuMP Year-End Projection	% of Projected Actuals to Revised Bud
Solid Waste Management Fund				
EXPENDITURES				
Unappropriated Fund Balance	\$1,887,499	\$0	\$2,251,231	119%
Personal Services	\$1,779,186	\$1,104,747	\$1,765,657	99%
External Materials and Services	\$2,341,847	\$524,355	\$2,066,847	88%
Internal Materials and Services	\$1,407,264	\$154,666	\$1,279,020	91%
Bond Expenses	\$37,063	\$8,543	\$37,063	100%
Fund Transfers - Expense	\$235,601	\$95,751	\$235,601	100%
TOTAL EXPENDITURES	\$7,688,460	\$1,888,063	\$7,635,419	99%
REVENUES				
Budgeted Beginning Fund Balance	\$3,309,128	\$0	\$3,309,128	100%
Licenses & Permits	\$2,508,815	\$682,155	\$2,490,916	99%
Charges for Services	\$1,606,440	\$398,324	\$1,602,675	100%
Intergovernmental Revenues	\$0	\$0	\$0	0%
Interagency Revenue	\$197,000	\$8,419	\$197,000	100%
Fund Transfers - Revenue	\$2,659	\$0	\$2,659	100%
Miscellaneous	\$64,418	\$24,058	\$33,041	51%
TOTAL REVENUES	\$7,688,460	\$1,112,957	\$7,635,419	99%

Fund Projection Narrative

External M&S - about \$275K budgeted for Portland Recycles Phase II will be spent in FY 2011-12 instead of FY 2010-11.

Internal M&S – BPS will under spend on P&D due to one Curbsider was issued in 2010-12 and the cost for the Curbsider was shared between Planning, Solid Waste, and OMF.

Misc. Revenue – BPS anticipates less interest revenue to be collected due to lower interest rate.

Business Area Projection Report

	Spring BuMP Revised Budget	FY 2010-11 YTD Actuals Thru AP8	Spring BuMP Year-End Projection	% of Projected Actuals to Revised Bud
Bureau of Planning and Sustainability				
EXPENDITURES				
Personal Services	\$2,096,633	\$773,778	\$1,402,691	67%
External Materials and Services	\$22,282,309	\$1,852,095	\$6,758,048	30%
Internal Materials and Services	\$30,000	\$15,480	\$21,951	73%
TOTAL EXPENDITURES	\$24,408,942	\$2,641,352	\$8,182,690	34%
REVENUES				
Intergovernmental Revenues	\$24,408,942	\$3,624,772	\$8,182,690	34%
TOTAL REVENUES	\$24,408,942	\$3,624,772	\$8,182,690	34%

Bureau Projection Narrative

General Fund

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Grants Fund

Personal Services – the projected year-end cost is lower than anticipated and the remaining amount will be carried over into FY 2011-12 to continue several of the multi-year grants.

External and Internal Materials and Services – The projected expenses is lower than budgeted and the remaining amount will be carried over into FY 2011-12 to continue several of the multi-year grants.

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.

Spring 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)

Spring BuMP Update:

Work progressed on all three of these projects. Portland Plan completed Phase 2 setting goals and objectives as well as Phase 3 public workshops held in 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 held a River Issues forum 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

Spring 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

Spring BuMP Update:

BPS entered into an Intergovernmental Agreement with Portland Public Schools and has paid PPS \$70,000 to purchase durable lunch trays. Design and procurement for the public recycling containers is now complete, and the first containers were installed in April 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.

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.

Spring BuMP Update:

The BPS strategic plan is complete. The document, which covers 2011 to 2013, outlines BPS' mission, values, goals, and programmatic work. It has been shared with internal and external bureau partners. BPS leadership is now working 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.

Spring 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.

Spring 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.