



Bureau of Planning and Sustainability  
Innovation. Collaboration. Practical Solutions.

# Bureau of Planning and Sustainability

## Fiscal Year 2012-13

### Requested Budget



City of Portland, Oregon | Bureau of Planning and Sustainability  
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To: Budget Office  
Commissioner Nick Fish  
Commissioner Amanda Fritz  
Commissioner Randy Leonard  
Commissioner Dan Saltzman  
City Auditor LaVonne Griffin-Valade

From: Mayor Sam Adams

Date: January 30, 2012

RE: Requested Budget FY 2012-13 – Bureau of Planning and Sustainability

I am pleased to convey to you the Requested Budget for FY 2012-13 for the Bureau of Planning and Sustainability. BPS has experienced substantial reductions in its General Fund support in the past three years, resulting in the net loss of nearly 20 planning positions. On-going General Fund is not sufficient to carry out several key and mandated efforts.

I intend to do further evaluation of this budget request in the next phase of the budget process, however, as the Commissioner-in-Charge of the Office of Management and Finance (OMF), I am pleased to present to you their budget request for FY 2012-13.

### **Decision Packages – Cuts**

BPS has identified cut packages of 4%, 6% and 8% in General Fund resources. Cuts include 6.1FTE in the 8% package, which will significantly delay and reduce the scope of the Central City Plan and downscale the Comp Plan update, which must still be completed by the state-mandated Periodic Review deadline. The 4% and 6% cut packages both result in delays in the Central City Plan but preserve the City's ability to deliver a credible Comprehensive Plan to meet the state deadline. This depends critically, however, on receiving the one-time General Fund request to complete the Comprehensive Plan, as described below.

### **Decision Packages - Adds**

Core BPS work has been funded through one-time General Fund support for a number of years. For FY 12-13, BPS has proposed a set of decision packages to enable the City to fulfill its obligation to complete the State-mandated periodic review of its Comprehensive Plan, to complete the West Hayden Island project, and to continue the City's long-standing support of engaging Portland's youth in planning processes.

#### **1. State-Mandated Comprehensive Plan, \$559k, one-time General Fund**

The City is under a State mandate to submit an updated Comprehensive Plan to the State Department of Land Conservation and Development (LCDC) by October 2013. Completion of the Comprehensive Plan update also is a priority action item in the Portland Plan. During the Portland Plan process, a significant amount of work has been completed on the Comprehensive Plan, which is why we believe the project can be completed in this aggressive timeframe.

The Comp Plan workplan is being adjusted to make staff resources available for the project. The requested add-package funds are for professional services to perform required technical analysis and facilitation. Funding will also continue the successful arrangement used in the Portland Plan, where BPS provides funding to the City's Diversity in Civic Leadership member organizations so they are able to assist with targeted outreach and engagement with their communities, groups that are typically underrepresented in City processes.

2. **Youth Planning, \$149k, one-time General Fund**

The Youth Planning Program hires youth ages 14-21 to work alongside planners and sustainability professionals. Engaging youth in planning and civic life in an empowered way is our goal. Youth 18 and under make up one quarter of Portland's population, while youth 25 and under make up one third. The add package implements part of the Portland Plan, specifically support for career pathways for youth and incorporation of underrepresented voices, such as those of youth, found in the plan's Equity Framework and Thriving Educated Youth strategy.

3. **West Hayden Island, \$51k, one-time General Fund**

Funding is needed for additional staff time that is critical to complete the West Hayden Island project. This will involve an extended period of public outreach for hearings at the Planning and Sustainability Commission and City Council and tasks to finalize agreements and respond to potential appeals. The proposed add package would extend a Community Outreach Representative for six months.

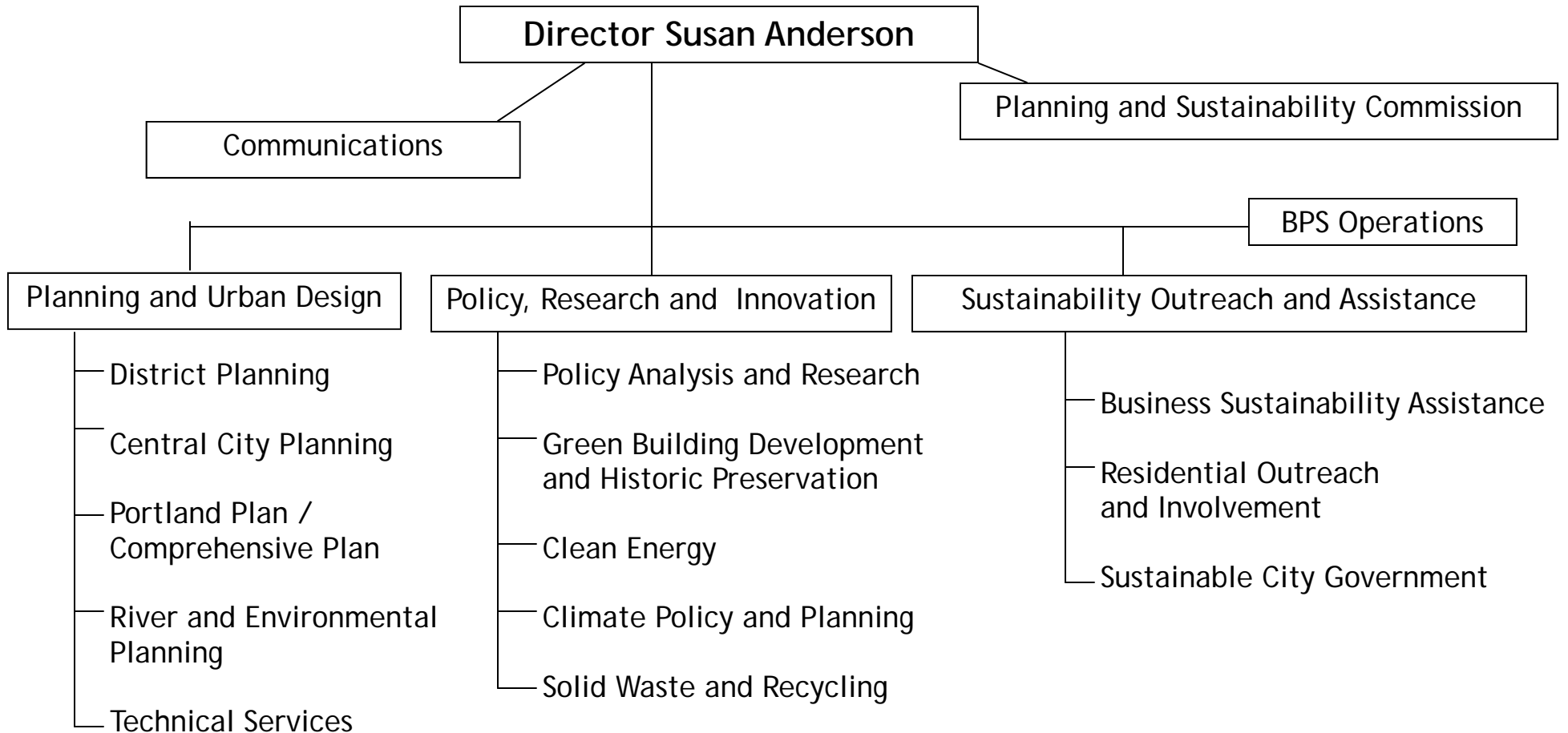
Thank you for your consideration.

Sincerely,



Sam Adams  
Mayor, City of Portland

# Bureau of Planning and Sustainability



# Bureau of Planning and Sustainability

## FY2012-13 Budget Narrative

### BUREAU MISSION

Create a prosperous, equitable and healthy city. To do this, the Bureau of Planning and Sustainability (BPS):

- Builds partnerships.
- Engages, inspires and educates residents and businesses.
- Advances policy, programs, plans, regulations and urban design that foster both innovation and practical solutions.

### BUREAU OVERVIEW

The Bureau of Planning and Sustainability ensures that sustainability principles are thoroughly integrated into the core of Portland's strategic planning, land use planning and development policies. The depth of staff expertise and extensive community engagement help affirm the bureau's reputation as a world class "planning and doing" organization.

BPS also develops and implements policies and programs that provide environmental, economic and social benefits to residents, businesses, and government, which strengthen Portland's position as an international model of sustainable practices and commerce. To accomplish these objectives, the bureau:

- Works with the City Council, Planning and Sustainability Commission, other City bureaus, public agencies, non-profits, businesses and the community to develop a cohesive vision for the future of Portland and take steps toward realizing that vision.
- Maintains, modifies and updates a Comprehensive Plan to guide the development and redevelopment of the city and ensures that City policies, implementation tools and zoning designations are consistent with the Comprehensive Plan and regional and state requirements.
- Undertakes activities to develop and implement the Portland Plan. These activities include taking the plan to City Council for adoption, maintaining and refining the Portland Plan indicators in coordination with Metro's regional indicator project called Portland Pulse, integration of the Portland Plan into future budgeting processes with OMF and development of specific evaluation and policy approaches called for in the Plan including update of the City Comprehensive Plan and zoning codes.
- Develops and updates City sustainability principles, climate protection strategies (including the Climate Action Plan) and related policies and programs that address sustainable government operations, green building, ecodistricts, renewable energy, energy efficiency, sustainable industries and sustainable food systems.
- Develops and updates economic, environmental, housing, historic preservation and community development policies and programs; analyzes demographic data; advocates for and advances quality sustainable urban design; works to ensure natural resource enhancement; and supports thriving neighborhoods and business communities.
- Evaluates the implementation and effectiveness of sustainability policies and programs.
- Administers the City's solid waste and recycling rules and programs and provides technical assistance and support to businesses, residents, nonprofit organizations and public agencies to reduce waste, increase reuse and increase recycling.
- Seeks to expand the City's partnerships with public, private and community-based organizations, advancing collaborative and entrepreneurial approaches to fostering sustainability throughout Portland.

## **STRATEGIC DIRECTION + SERVICE IMPROVEMENT PLAN**

### **1. State-Mandated Period Review / Comprehensive Plan Update**

A top priority for the Bureau of Planning and Sustainability is completion of the State-mandated periodic review and update of the City's Comprehensive Plan. This is the largest single action assigned to BPS as part of implementation of the Portland Plan. The updated Comprehensive Plan must be submitted to the State Department of Land Conservation and Development (LCDC) by October 2013. The Comprehensive Plan is the City's long-range guide to development and land use. It is required for all future land use, zoning and major public capital project decisions. The update of the Comprehensive Plan will build on the priorities and direction set in the Portland Plan. It will integrate, into this core decision-making guide, other City plans adopted since the last major update of the Comprehensive Plan in the 1980s.

### **2. Central City Plan**

The Central City Plan is a specific Comprehensive Plan element addressing downtown and the central city. It updates the 1972 Downtown Plan and 1988 Central City Plan. It identifies how the City can build on past investments and successes to strengthen the central city's critical role for the rest of the city and region, especially concerning economic and residential growth. It includes policies that support expansion of major institutions; improvements in livability, affordable housing; the Willamette River; and the role of the central city in arts, culture, entertainment and retail. In this fiscal year, we will complete the CC2035 concept plan, which provides unified guidance for the entire Central City. BPS will also complete a more detailed plan for the Northeast Quadrant of the Central City. We will begin work on the Northwest and Southwest Quadrant Plans with the intention of completing planning for the entire west side of the Central City in 18 months.

### **3. Climate Action Plan**

Portland's pioneering work to reduce greenhouse gas emissions has provided internationally recognized examples of beneficial approaches to climate protection. Climate change impacts housing, industry, agriculture, water resources, transportation, energy use and quality of life. In 2009, City Council adopted the Climate Action Plan, a major update to the City's previous climate protection strategy. The Climate Action Plan establishes a goal of reducing carbon emissions 80 percent by 2050 and proposes specific actions for the City to take by 2012 to accelerate the transition to a low-carbon community. Key efforts in FY12-13 include accelerating energy efficiency in commercial buildings, continuing to work with Clean Energy Works Oregon to provide up-front financing for home energy efficiency upgrades, evaluating the impact of the new residential composting service, and developing a new set of three-year actions to implement beginning in 2013.

### **4. Portland Plan Implementation**

The Portland Plan is a strategic plan for the City and a guide for alignment among the 18 other government bodies and agencies that participated in the plan's development. We anticipate that the Portland Plan will be adopted by City Council in FY11-12. There are a number of tasks that BPS, with others, will need to undertake to begin implementation of the Portland Plan and to build it into the City's annual budget process. As noted, the Comprehensive Plan update is the Bureau's largest single Portland Plan implementing project in the coming year.

Additional tasks and new practices that the Bureau must undertake include completion of intergovernmental agreements needed to implement the plan. Specifically we need to develop agreements regarding long-range planning with the five school districts in Portland. The Bureau will need to create a mechanism, possibly in cooperation with PSU, for upkeep and refinement of the Portland Plan indicators and also will need to develop tracking and reporting mechanisms for the plan. The Bureau will continue to coordinate with organizations involved in public health including Multnomah County Health Department to continue our work on incorporating consideration of health impacts into long-range plans. The Bureau expects to

work closely with Office of Equity and Human Relations and the Office of Management and Finance to develop a shared work plan regarding the specific actions identified in the Portland Plan's Equity Framework. Specifically, we expect to work on development of approaches to tracking and evaluating the social equity impacts of public investments and programs.

## 5. Equity

In addition to our work related to equity that is part of Portland Plan implementation, the Bureau will continue its work on equity issues. Portland has achieved demonstrable success in pursuing sustainable development, but we continue to face challenges in advancing equity, cultural competence and diversity development throughout the community. Development and implementation of major efforts like the Portland Plan and Climate Action Plan present critical opportunities to ensure that equity for all Portlanders is a central component of the Bureau's work, and BPS is committed to integrating the social elements of sustainability into all aspects of its programs, policies and plans.

## SUMMARY OF BUDGET DECISIONS

### Reductions

- **Reduction in On-Going General Fund Resources**  
BPS' cut packages of 4%, 6%, and 8% in the Requested Budget identify \$90K in operational savings and \$35K reduction in IAs. Cuts also significantly reduce Central City Plan staffing, and contract expenses, which require downscaling of the Comprehensive Plan update that can be prepared in time for Periodic Review deadline.

### One-Time General Fund Adds

1. **Comprehensive Plan - \$559k (\$123k personnel; \$436k external services)**  
The City is under a State mandate to submit an updated Comprehensive Plan to the State Department of Land Conservation and Development (LCDC) by October 2013. Completion of the Comprehensive Plan update also is a priority action item in the Portland Plan. During the Portland Plan process, a significant amount of work has been completed on the Comprehensive Plan, which is why we believe the project can be completed in this aggressive timeframe.

The Comp Plan workplan is being adjusted to make staff resources available for the project. The requested add-package funds are for professional services to perform required technical analysis and facilitation. Funding will also continue the successful arrangement used in the Portland Plan, where BPS provides funding to the City's Diversity in Civic Leadership member organizations so they are able to assist with targeted outreach and engagement with their communities, groups that are typically underrepresented in City processes.

2. **West Hayden Island - \$51k (all personnel)**  
Funding is needed for additional staff time that is critical to complete the West Hayden Island project. This will involve an extended period of public outreach for hearings at the Planning and Sustainability Commission and City Council and tasks to finalize agreements and respond to potential appeals. The proposed add package would extend a Community Outreach Representative for six months.
3. **Youth Planning - \$149k (\$95k personnel; \$54k external materials and services)**  
The Youth Planning Program hires youth ages 14-21 to work alongside planners and sustainability professionals. Engaging youth in planning and civic life in an empowered way is our goal. Youth 18 and under make up one quarter of Portland's population, while youth 25 and under make up one third. The add package implements part of the Portland Plan, specifically support for career pathways for youth and incorporation of



underrepresented voices, such as those of youth, found in the plan's Equity Framework and Thriving Educated Youth strategy.

## **PROGRAM NARRATIVE**

### **Administration & Support**

Administration and Support reflects a broad array of services and skills that contribute to an effective, well-functioning organization. These range from the leadership by the Bureau Director to communications services, and day-to-day support of finance, personnel and administrative staff. Additionally, the general materials and services (overhead costs) associated with operating a large organization are reflected in this budget.

### **Director's Office**

The Director's Office houses the bureau's director and an executive assistant. The office provides leadership and oversight for the entire bureau, City and a broad range of local, regional, national and international stakeholders and partners. This Office also oversees the coordination of the Planning and Sustainability Commission.

### **Planning and Urban Design**

Provides strategic, comprehensive, long-range and district planning and urban design services.

### **Portland Plan**

The staff of this program has lead responsibility for work and follow-up to the adoption of the Portland Plan. The tasks include completion of intergovernmental agreements regarding long-range planning with the five school districts in Portland; upkeep and refinement of the Portland Plan indicators, including developing tracking and reporting mechanisms for the plan; and, with Office of Equity and Human Relations and the Office of Management and Finance, development of approaches to tracking and evaluating the social equity impacts of public investments and programs.

### **Comprehensive Plan**

The staff of this program has lead responsibility update the City's Comprehensive Plan and response to State mandated Periodic Review requirements. By Summer 2012, BPS will produce an initial draft of the Comprehensive Plan that builds on the strategic plan and will serve as a starting place for public review. The project is the centerpiece of the Bureau's planning program over the next 18 months and will involve participation of staff from all the Bureau's planning and policy development programs. The project also involves significant participation by other City bureaus including the bureaus of Transportation, Environmental Services, Housing, Parks and Recreation, the Office of Management and Finance and the Portland Development Commission.

### **District Planning and Area Projects**

Assigned to each of five districts within Portland outside of the Central City, District Liaisons are the bureau's experts in their districts' physical, social, and economic conditions, as well as local issues, opportunities, and aspirations related to livability and the built environment.

District Liaisons serve as problem solvers, technical advisors, and advocates for residents, business owners and employees, youth, institutions, non-profit organizations, property owners, and others engaged in improving Portland's quality of life. District Liaisons have a lead role in the next phase of the Comprehensive Plan update. Staff from this program also will lead or be involved with specific projects including the Cully Main Street Zoning project, SW Barbur Boulevard Concept Plan, SE 122<sup>nd</sup> Avenue zoning changes, food production code updates and PDC's Neighborhood Economic Development strategy.

### **Central City**

The Central City Planning program provides planning services essential to maintaining Portland's downtown and other Central City districts as the economic and cultural center of the region. Program staff acts as the Bureau's experts in the physical, social and economic conditions, issues, aspirations and projects in the Central City. They lead or provide expert support to specific planning projects, often in conjunction with PDC, PBOT, Parks, Oregon Department of Transportation, Metro and TriMet. The Central City planning staff also serve as liaisons to stakeholders on technical issues, coordination, design and implementation. The Central City program also includes the Urban Design team.

The update of the Central City Plan, CC2035, is currently underway. Consistent with strategic direction established with the Portland Plan, this plan develops policy and actions related to Central City economic development, residential neighborhoods, natural environment and transportation for the entire district as well as more detailed plans for each of the Central City's quadrants. CC2035 will be incorporated into, and adopted as part of, the Comprehensive Plan.

### **Urban Design**

The Urban Design program provides urban design analysis, services and advocacy. It does this work as part of bureau projects and through involvement in projects across City bureaus and non-City agencies, as well as with neighborhoods and other stakeholders including private sector designers and developers. Program staff lead planning, design and code development projects and studies. They advise on projects ranging in scale from district plans to specific sites. Urban design staff devotes significant time to supporting the design projects of Portland Parks and Recreation, the Bureau of Transportation, and the PDC. The Urban Design program has the lead role in developing the urban design plans integral to the Comprehensive Plan and the Central Portland Plan.

### **River and Environmental Planning**

The River Planning Program is responsible for updating Portland's State-mandated Willamette Greenway Plan, which is part of the City's Comprehensive Plan and zoning code. The River Planning Program develops integrated, interdisciplinary recommendations that promote economic prosperity, watershed health, livable neighborhoods and enhanced access to the river. The program does this by working closely with City, regional, state and federal agencies, tribal governments, property owners, businesses and other members of the community.

In FY12-13, staff will work on court-mandated revisions to the River Plan/North Reach in conjunction with the Comprehensive Plan update, will continue working on the River Plan/Central Reach as part of the Central City Plan update. They will begin work on the River Plan/South Reach as time permits.

The environmental planning program is responsible for City compliance with State and regional environmental land use policies, including Metro Title 13, State Goals 5, 6, and 7 and the Clean Water Act. This team leads updates of City natural resource management tools such as natural resource inventories and environmental overlay zones and tree rules and provides technical and policy support to BPS led projects and Citywide watershed, urban forestry, climate action, natural hazard and habitat-friendly development planning efforts.

In FY12-13, the program will continue updating natural resource inventories and providing technical expertise to BPS-led Citywide and area-specific planning projects

including the update of the Comprehensive Plan, River Plan, Central City Plan and West Hayden Island.

#### **Youth Planning Program**

The Youth Planning Program hires youth ages 14-21 to work alongside planners and sustainability professionals. Engaging youth in planning and civic life in an empowered way is our goal. Youth 18 and under make up one quarter of Portland's population, while youth 25 and under make up one third.

#### **Intergovernmental Coordination**

Staff in this program represents the City's interests with Metro and other local governments as well as the State, including significant staff involvement in the state's evaluation of the Oregon Land Use Planning Program. Ongoing activity includes participation in Metro technical committees and staffing Portland's elected officials serving on Metro advisory committees. The program also includes staffing of the Planning and Development Directors group.

#### **Code Development**

This group provides research and code development and editing services to BPS projects. When regulation is part of a solution, code development staff edit proposed code to ensure consistency, clarity, and ease of implementation. The group prepares impact assessments of costs and benefits of new regulations and polices.

#### **Policy, Research and Innovation**

Provides research and analysis, policy and program development, project demonstration, monitoring and evaluation, and grant writing.

#### **Economic Development Planning**

The economic planning staff provide a critical role in linking the City's short-term economic development strategy with the City's long-range comprehensive plan policies. The major focus of BPS Economic Development Planning for FY12-13 is the update of the economic development portions of the Comprehensive Plan. The team also focuses on development of the City's neighborhood business districts, coordination across bureaus regarding economic development policy, and unique expertise and research to Port of Portland, PDC and bureau area planning initiatives. For example, the team has provided economic analysis to the West Hayden Island planning project, the Portland Plan, CC2035 and PDC's Neighborhood Economic Development strategy.

#### **Historic Preservation**

The Historic Preservation program supports the preservation and rehabilitation of historically, culturally, and architecturally significant buildings, structures, sites and places. The program is responsible for developing and improving historic preservation policies, regulatory tools and incentives and for coordinating with federal, state and local agencies on preservation law compliance, permitting, and planning. It provides specialized expertise in support of City bureaus on legislative, development, and land use review projects. It provides specialized research, information and referral services to the Portland Historic Landmarks Commission on legislative and advisory review matters, City bureaus, and the public.

#### **Demography and Housing**

BPS analyzes a variety of data sources, notably the 2010 Census, to provide demographic and housing trends and analysis to inform City planning. For FY12-13, analysis will focus on guiding the development of the Comprehensive Plan, and coordination with the Portland Housing Bureau.

### **Asset Management**

This program coordinates and develops the annual City Infrastructure Asset Management Report (Status and Condition) in partnership with the Bureaus of Transportation, Environmental Services, Water, Parks and Management and Finance. Staff are currently working on evaluating infrastructure connections and impacts related to various Portland Plan and Comprehensive Plan strategies.

### **Climate Policy**

The Climate Policy program coordinates the implementation of the City's Climate Action Plan, including representing the City on local, state, and national energy policy issues, acquiring new resources to implement climate and energy programs, and developing new initiatives to carry out specific elements of the Climate Action Plan. A major effort for FY12-13 is to assess progress in carrying out the first three-year set of actions and identify specific activities to undertake in the next three years.

### **Green Building and Development**

The Green Building program develops policy and provides technical support for sustainable building practices in commercial and residential projects, including district-scale efforts like ecodistricts and district energy. Key services include project-by-project technical assistance, training, outreach and educational resource development. In FY12-13, major efforts will focus on improving commercial building performance, supporting development of district energy systems, institutionalizing the City's support for ecodistricts, and reducing construction and demolition debris.

### **Sustainable Food**

The City's food program provides resources, policy and education in support of a localized food system that promotes community health, equity, economic development and resiliency. Its goals are to expand opportunities for support of the direct-market economy, ensure a stable agricultural land base in the region and increase options for growing and consuming healthful food in the city.

### **Clean Energy**

The Clean Energy team implements programs and provides policy guidance to advance energy efficiency and renewable energy. BPS works closely with and is the primary funder of Clean Energy Works Oregon, a new non-profit that provides outreach, assistance and financing to homeowners with a goal of significantly improving the energy performance in 6,000 homes statewide by 2013. BPS' Clean Energy program also provides education and technical assistance on solar electric (photovoltaic) and solar water heating systems through Solar Now!, a one-stop resource for homeowners and businesses in partnership with Solar Oregon, Oregon Department of Energy and Energy Trust of Oregon.

### **Solid Waste and Recycling**

The Solid Waste and Recycling program regulates the collection of solid waste, recyclables and compostable materials from residential and commercial sources within the Portland Urban Services Boundary. The program carries out City Council's policy direction to reduce waste, increase recycling and maintain high-quality garbage and recycling collection at reasonable rates.

Residential program responsibilities include franchising of residential collection companies, enforcing service standards, setting rates, educating customers and promoting waste reduction and recycling in coordination with the Sustainability Education and Assistance program. In October 2011, Portland haulers began collecting food scraps along with yard debris on a weekly basis, with garbage collection shifting to

every other week. These program changes will be evaluated during FY12-13. The Solid Waste and Recycling Hotline fields about 18,000 calls each year from citizens, answering questions, resolving concerns and providing guidance on curbside recycling.

The Commercial program works with the Sustainability Education and Assistance program to provide recycling technical assistance to multifamily property managers and local businesses, issues permits, and enforces service standards and compliance with the City's requirement that businesses recycle at least 75% of their waste by 2015. Commercial service is not franchised or rate regulated in Portland. The Commercial program is also responsible for contracting for collection of public garbage in several business districts and is implementing a new public recycling that will begin on the downtown transit mall. BPS staff also address issues arising from garbage or recycling containers that are stored by businesses in the public right-of-way.

### **Sustainability Education and Assistance**

Develops and executes programs, events and educational campaigns to engage a diverse range of residents and businesses in new behaviors and organizational practices in the areas of climate action, thoughtful consumption, recycling and overall sustainability practices.

#### **Sustainability Education and Assistance**

Programs run by the Sustainability Education and Assistance team include:

- Be Cart Smart outreach and education campaign - continue to engage residents and support changes to the curbside collection system including food scraps being included in the green Portland Compost! roll cart and every-other week garbage collection.
- Sustainability at Work serves as a one-stop point of contact to over 1,000 businesses annually to access free technical assistance on waste prevention, recycling and composting, energy and water efficiency, transportation, stormwater management and other sustainable practices.
- The Master Recycler program, a regional partnership, provides extensive waste prevention and recycling training to 100 community members annually, who then volunteer their time and expertise at thousands of hours of events.
- The Multifamily Residential Recycling program works with property owners, managers and tenants to ensure that over 20,000 multifamily households are provided with quality recycling and garbage collection and education. Starting FY12-13, we will develop and execute a food scrap collection pilot.
- Fix-It Fairs are neighborhood-based events that help connect Portland residents with practical resource-conservation information and organizations. About 2,200 residents attend the three fairs put on each year.
- Event Recycling and Composting program provides recycling equipment and technical assistance for 130 public events annually.
- In collaboration with the Neighborhood District Coalitions and Metro, BPS funds and coordinates 50 Neighborhood Cleanup Events annually. These events provide residents with the opportunity to dispose of bulky or unusual waste conveniently, economically and responsibly.
- Be Resourceful: Live More, Save More. In FY12-13, staff will execute a thoughtful consumption campaign focused on engaging Portlanders to making simple changes in how they get what they need.
- The program also organizes the bureau's signature events, such as the BEST Awards, to ensure a positive and engaging experience for a diverse range of participants, as well as, coordinates BPS and inter-bureau participation at community events.

### **Sustainable City Government**

The Sustainable City Government program systematically addresses energy, water and resource use, toxic reduction, sustainable procurement and renewable energy production through innovative policies, programs and implementation strategies. Starting in FY11-12 and finishing in FY12-13, BPS is coordinating the development of a Sustainable City Government Operations Report, which will highlight cross-bureau policies, stores and challenges.

#### **Communications**

The Communications staff provides services for the entire bureau including public information, event promotion, media relations, web site development, production of materials and graphic design. The team has provided significant support to the public involvement elements of the Portland Plan and will play a similar role on the Comprehensive Plan.

## Summary of Bureau Budget

	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Requested Without DP's	FY 2012-13 Requested Budget
<b>Bureau of Planning &amp; Sustainability</b>					
<b>Expenditures</b>					
Unappropriated Fund Balance	2,073,349	0	1,568,358	1,363,299	1,422,803
Personal Services	11,077,254	10,261,057	11,277,133	10,721,618	10,600,651
External Materials and Services	5,870,955	6,626,892	15,948,729	7,650,227	7,929,247
Internal Materials and Services	3,468,641	2,826,380	2,690,728	2,839,847	2,774,372
Debt Service	33,190	35,788	40,208	43,601	43,601
Fund Transfers - Expense	909,372	227,167	148,316	155,783	155,783
<b>Total Expenditures</b>	<b>23,432,761</b>	<b>19,977,283</b>	<b>31,673,472</b>	<b>22,774,375</b>	<b>22,926,457</b>
<b>Resources</b>					
Budgeted Beginning Fund Balance	4,269,894	0	3,178,244	1,646,642	1,646,642
Licenses & Permits	2,331,097	2,511,304	2,595,699	2,553,721	2,553,721
Charges for Services	1,507,842	1,572,059	1,605,148	1,975,099	1,975,099
Intergovernmental Revenues	3,118,946	7,964,972	14,965,172	8,326,083	8,326,083
Interagency Revenue	1,243,505	474,761	138,539	112,500	112,500
Fund Transfers - Revenue	1,468,142	99,516	101,082	0	0
Bond and Note Proceeds	0	0	0	0	0
Miscellaneous Sources	121,806	105,219	50,423	44,580	44,580
General Fund Discretionary	9,222,272	0	8,482,500	7,586,689	7,738,771
General Fund Overhead	149,256	0	556,665	529,061	529,061
<b>Total Resources</b>	<b>23,432,761</b>	<b>12,727,831</b>	<b>31,673,472</b>	<b>22,774,375</b>	<b>22,926,457</b>

## Summary of Program Budgets

	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Requested Without DP's	FY 2012-13 Requested Budget
<b>Bureau of Planning &amp; Sustainability</b>					
<b>Area Planning</b>					
Area Planning	33,861	33,673	0	0	0
Central City Planning	1,059,255	1,233,632	1,110,815	1,181,777	980,284
District Planning	1,902,443	932,970	1,471,905	1,230,449	1,195,835
River Planning	404,137	358,405	344,164	346,314	346,314
Youth Program	0	54,351	70,444	0	149,000
<b>Total Area Planning</b>	<b>3,399,697</b>	<b>2,613,030</b>	<b>2,997,328</b>	<b>2,758,540</b>	<b>2,671,433</b>
<b>Administration &amp; Support</b>					
Administration	1,652,844	650,181	322,648	0	0
Business Services	179,791	(7,149)	352,475	698,374	698,374
Communications	884,467	116,497	98,157	0	0
Director's Office	699,410	458,863	339,960	352,035	352,035
Bureau Operating Costs	445,817	1,881,563	2,237,684	1,233,114	1,044,421
Operations	792,307	228,871	0	0	0
Technical Administrative Support	0	3,116	0	124,897	124,897
<b>Total Administration &amp; Support</b>	<b>4,654,637</b>	<b>3,331,940</b>	<b>3,350,924</b>	<b>2,408,420</b>	<b>2,219,727</b>
<b>Comprehensive &amp; Strategic Planning</b>					
Comprehensive & Strategic Planning	0	849,392	903,234	1,028,169	909,771
Portland & Comprehensive Plan	1,021,693	1,453,247	2,503,237	1,076,552	1,572,906
Intergovernmental Coordination	336,788	6,805	0	0	0
Measure 37	6,536	0	0	0	0
River Renaissance Initiative	6,615	0	0	0	0
Strategic Planning	517,827	29,264	0	0	0
<b>Total Comprehensive &amp; Strategic Planning</b>	<b>1,889,459</b>	<b>2,338,708</b>	<b>3,406,471</b>	<b>2,104,721</b>	<b>2,482,677</b>
<b>Housing Production &amp; Preservation</b>					
Rehabilitation	(0)	0	0	0	0
<b>Total Housing Production &amp; Preservation</b>	<b>(0)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>



## Summary of Program Budgets

	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Requested Without DP's	FY 2012-13 Requested Budget
<b>Bureau of Planning &amp; Sustainability</b>					
<b>Specialized Planning</b>					
Specialized Planning	10,000	0	0	0	0
Code Development	687,244	20,956	0	0	0
Economic Development Planning	104,907	72,277	0	0	0
Environmental Planning	432,865	224,973	199,872	172,920	172,920
Historic Preservation	180,743	14,910	0	0	0
Urban Design	297,253	(6,216)	0	0	0
<b>Total Specialized Planning</b>	<b>1,713,012</b>	<b>326,901</b>	<b>199,872</b>	<b>172,920</b>	<b>172,920</b>
<b>Waste Reduction &amp; Recycling</b>					
Waste Reduction & Recycling	1,411,852	1,508,251	7,887	0	0
Solid Waste Commercial	0	31,684	1,150,083	979,046	979,046
Customer Services	(23,602)	29,422	0	0	0
Operations	787,563	732,927	0	0	0
Policy & Program Development	57,006	13,493	0	0	0
Solid Waste Residential	0	48,449	1,050,324	1,422,840	1,422,840
<b>Total Waste Reduction &amp; Recycling</b>	<b>2,232,818</b>	<b>2,364,226</b>	<b>2,208,294</b>	<b>2,401,886</b>	<b>2,401,886</b>
<b>Sustainability Education &amp; Assistance</b>					
Sustainability Education & Assistance	55,364	66,773	99,872	137,927	137,927
Business Sustainability Assistance	996,280	1,056,906	1,047,745	1,084,941	1,084,941
Communications	0	553,313	609,851	390,266	390,266
Multifamily	69,042	1,254	211,598	296,705	296,705
Residential Outreach	685,715	648,168	1,393,798	786,331	786,331
Technical Outreach	228,271	142,304	0	0	0
<b>Total Sustainability Education &amp; Assistance</b>	<b>2,034,672</b>	<b>2,468,719</b>	<b>3,362,864</b>	<b>2,696,170</b>	<b>2,696,170</b>
<b>Policy, Research &amp; Innovation</b>					
Policy, Research & Innovation	718,770	(519,200)	94,044	0	0
Clean Energy	0	3,429,483	12,186,576	6,489,975	6,489,975

## Summary of Program Budgets

	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Requested Without DP's	FY 2012-13 Requested Budget
<b>Bureau of Planning &amp; Sustainability</b>					
<b>Policy, Research &amp; Innovation</b>					
Economic Development	131,287	50,540	0	0	0
Climate Policy & Planning	823,509	172,393	61,000	380,744	380,744
Green Building & Development	1,774,840	855,078	872,019	872,317	823,659
Policy Analysis and Research	0	815,369	876,117	737,137	776,217
Sustainable City Government	927,507	1,362,354	178,837	75,000	75,000
Sustainable Food	116,642	104,786	122,244	113,862	113,862
<b>Total Policy, Research &amp; Innovation</b>	<b>4,492,554</b>	<b>6,270,804</b>	<b>14,390,837</b>	<b>8,669,035</b>	<b>8,659,457</b>
<b>Engineering</b>					
Asset Systems Management	0	0	0	0	0
<b>Total Engineering</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total Programs</b>	<b>20,416,850</b>	<b>19,714,328</b>	<b>29,916,590</b>	<b>21,211,692</b>	<b>21,304,270</b>

# Bureau of Planning & Sustainability

## Performance Measures

Performance Measure	Type	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
		Year-End Actuals	Year-End Actuals	Revised Budget	Performance No Dec Pkg	Performance With Dec Pkg
PN_0006 - Citywide Livability Rating	EFFECTIVE	83%	80%	81%	80%	80%
PN_0013 - Overall Rating - Planning for Future Land Use	EFFECTIVE	43%	40%	40%	42%	40%
PN_0014 - Percent of significant natural resources protected through non-regulatory and/or regulatory measures	EFFECTIVE	80%	80%	81%	81%	81%
PN_0015 - Percent of residents rating neighborhood livability "good" or "very good"	EFFECTIVE	88%	87%	86%	87%	85%
PN_0016 - Percent of residents rating access to shopping and other services "good" or "very good"	EFFECTIVE	74%	76%	75%	75%	74%
PN_0019 - Percent of residents rating the attractiveness of new residential development good or very good	EFFECTIVE	53%	61%	62%	63%	63%
PN_0020 - Percent of housing built in four-county region within City of Portland limits	EFFECTIVE	28%	33%	30%	32%	32%
SD_0001 - Percent of residential material diverted from wastestream	EFFECTIVE	51%	51%	54%	57%	57%
SD_0002 - Percent of commercial material diverted from wastestream	EFFECTIVE	64%	69%	71%	73%	73%
SD_0003 - Residents reached by sustainable training and outreach	WORKLOAD	61,648	71,290	150,000	90,000	90,000
SD_0007 - Grants and contracts awarded	WORKLOAD	\$4,234,869	\$6,209,678	\$14,289,000	\$7,950,000	\$7,950,000
SD_0008 - Percent reduction in local per capita CO2 emissions from 1990 levels	EFFICIENCY	20%	22%	26%	27%	27%
SD_0014 - Pounds of solid waste generated per household	WORKLOAD	1,252	1,248	1,235	1,225	1,225
SD_0015 - Tons of solid waste generated by businesses	WORKLOAD	248,099	238,902	207,972	200,000	200,000
SD_0016 - Typical residential garbage and recycling monthly bill, adjusted for inflation (2000 dollars)	EFFICIENCY	\$26.63	\$27.85	\$29.51	\$29.60	\$29.60
SD_0018 - Citizens' satisfaction with solid waste and recycling programs (percent rating "good" or "very good")	EFFECTIVE	80%	78%	78%	80%	80%
SD_0019 - Businesses reached by sustainability outreach and training	WORKLOAD	1,675	1,089	1,000	1,000	1,000
SD_0020 - Number of multifamily units provided with recycling assistance	WORKLOAD	18,141	20,626	18,000	18,500	18,500
SD_0023 - Number of development projects provided with green building assistance	WORKLOAD	16	16	15	20	20
SD_0024 - Number of design and construction industry professionals trained in green building practices	WORKLOAD	768	1,163	1,000	1,000	1,000
SD_0025 - Per capita residential energy use (million BTUs)	EFFECTIVE	29.40	28.10	28.00	27.00	27.00
SD_0026 - Number of certified green buildings in Portland	EFFECTIVE	1,595	1,700	2,200	2,500	2,500
SD_0027 - Utility savings to City from energy- and water-efficiency projects and waste and toxics reduction (million dollars)	EFFECTIVE	\$3.57	\$3.54	\$5.30	\$5.40	\$5.40
SD_0028 - Percent of City electricity use from renewable resources	EFFECTIVE	9.0%	9.5%	14.3%	15.0%	15.0%
SD_0031 - Bureaus assisted with sustainability projects	WORKLOAD	16	40	26	26	26
SD_0032 - City employees provided with sustainability training	WORKLOAD	240	50	145	155	155
SD_0036 - Citizens participating in workshops	WORKLOAD	2,475	2,135	2,100	2,200	2,200
SD_0037 - Cost per Fix-It Fair participant	EFFICIENCY	\$45.00	\$65.00	\$60.00	\$58.00	\$58.00
SD_0038 - Residents participating in urban agricultural projects	WORKLOAD	4,000	4,700	7,500	9,000	9,000
SD_0041 - Number of residential and commercial solar energy systems installed in Portland since 2006	EFFECTIVE	1,168	1,471	1,800	2,200	2,200

**Total FTE and Salary by Class  
Bureau of Planning & Sustainability**

Class	Title	CY_REVBUD {Rep}		V52_NO_DP {Rep}		V52_TOTAL {Rep}	
		No.	Amount	No.	Amount	No.	Amount
30000064	Accountant III	1.00	65,579	0.00	0	0.00	0
30000061	Accounting Technician	1.00	43,956	1.00	45,180	1.00	45,180
30000433	Administrative Specialist, Sr	3.00	155,304	3.00	159,182	3.00	159,182
30000436	Administrative Supervisor I	1.00	54,720	1.00	56,964	1.00	56,964
30000184	Code Specialist II	1.00	54,408	1.00	55,932	1.00	55,932
30000491	Community Outreach & Informtn Assistant	1.00	53,595	1.00	55,798	1.00	55,798
30000492	Community Outreach & Informtn Rep	4.00	269,044	5.00	340,798	5.00	340,798
30000506	Conservation Program Coordinator	3.00	218,867	3.00	223,134	3.00	223,134
30000507	Conservation Program Coordinator, Sr	6.00	428,962	5.00	394,498	5.00	394,498
30000509	Conservation Program Manager	1.00	90,662	1.00	94,372	1.00	94,372
30000505	Conservation Program Specialist	4.00	217,960	3.25	225,410	3.25	225,410
30000435	Executive Assistant, Director's	1.00	62,268	1.00	64,185	1.00	64,185
30000567	Financial Analyst	1.00	57,444	1.00	60,471	1.00	60,471
30000568	Financial Analyst, Sr	1.00	83,724	1.00	86,064	1.00	86,064
30000342	GIS Technician II	1.00	50,688	1.00	50,688	1.00	50,688
30000373	Graphics Designer III	1.00	78,648	1.00	78,648	1.00	78,648
30000212	Inf Syst Analyst II-GIS,Vertical	1.00	76,584	1.00	76,584	1.00	76,584
30000451	Management Analyst	3.00	200,091	3.00	223,229	3.00	223,229
30000452	Management Analyst, Sr	1.00	78,856	1.00	82,040	0.00	(4)
30000450	Management Assistant	2.00	125,664	2.00	129,206	2.00	129,206
30000012	Office Support Specialist II	3.00	131,868	3.00	131,868	3.00	131,868
30000383	Planner II. City-Economic	1.00	59,256	1.00	61,929	1.00	61,929
30000385	Planner II. City-Land Use	9.00	597,648	8.00	549,504	7.35	504,348
30000389	Planner II. City-Urban Design	1.00	68,448	1.00	68,448	1.00	68,448
30000375	Planner, Associate	2.00	97,752	2.00	105,456	(0.65)	(36,780)
30001053	Planner, Chief	1.00	149,232	1.00	154,290	1.00	154,290
30000725	Planner, Principal	2.50	224,525	2.00	222,316	2.00	222,316
30000391	Planner, Sr City-Economic	1.00	78,648	1.00	78,648	1.00	78,648
30000392	Planner, Sr City-Environmental	1.00	78,648	1.00	78,648	1.00	78,648
30000393	Planner, Sr City-Land Use	8.00	619,946	8.00	626,712	8.00	626,712
30000397	Planner, Sr City-Urban Design	1.00	78,648	1.00	78,648	1.00	78,648
30000724	Planner, Supervising	2.50	248,999	3.00	291,576	3.00	291,576
30001054	Planning & Sustainability Director	1.00	183,534	1.00	186,060	1.00	186,060
30000464	Program Coordinator	1.00	71,208	1.00	71,208	2.00	138,624
30000466	Program Manager, Sr	1.00	86,599	1.00	90,151	1.00	90,151
30000463	Program Specialist	1.00	61,594	1.00	64,118	1.00	64,118
30000462	Program Specialist, Assistant	3.00	162,924	3.00	168,989	3.00	168,989
30000495	Public Information Officer	1.00	72,180	1.00	74,650	1.00	74,650
30000508	Solid Waste & Recycling Program Manager	1.00	100,044	1.00	100,044	1.00	100,044

**Total FTE and Salary by Class  
Bureau of Planning & Sustainability**

Class	Title	CY_REVBUD {Rep}		V52_NO_DP {Rep}		V52_TOTAL {Rep}	
		No.	Amount	No.	Amount	No.	Amount
30001509	Web Designer	1.00	58,036	1.00	60,416	1.00	60,416
<b>Total Full-Time Positions</b>		<b>81.00</b>	<b>\$5,696,761</b>	<b>78.25</b>	<b>\$5,766,062</b>	<b>74.95</b>	<b>\$5,564,042</b>
30000447	Business Systems Analyst, Assistant	0.90	25,332	0.80	46,280	0.80	46,280
30000338	Environmental Technician II	0.90	58,200	0.90	58,200	0.90	58,200
30000385	Planner II. City-Land Use	1.80	114,936	1.70	118,632	1.70	118,632
30000462	Program Specialist, Assistant	0.90	33,864	0.60	38,912	0.60	38,912
<b>Total Part-Time Positions</b>		<b>4.50</b>	<b>\$232,332</b>	<b>4.00</b>	<b>\$262,024</b>	<b>4.00</b>	<b>\$262,024</b>
30000063	Accountant II	0.50	24,876	1.00	55,212	1.00	55,212
30000433	Administrative Specialist, Sr	1.92	91,902	2.00	103,689	2.00	103,689
30000492	Community Outreach & Informtn Rep	2.75	182,400	1.00	70,067	1.50	106,535
30000506	Conservation Program Coordinator	2.00	148,068	2.00	153,288	2.00	153,288
30000507	Conservation Program Coordinator, Sr	2.00	169,272	1.00	87,000	1.00	87,000
30000505	Conservation Program Specialist	4.58	302,370	4.00	281,529	4.00	281,529
30000567	Financial Analyst	0.90	39,156	1.00	45,288	1.00	45,288
30000372	Graphics Designer II	1.75	102,684	1.00	64,668	1.00	64,668
30000450	Management Assistant	2.00	85,892	1.50	91,060	1.50	91,060
30000384	Planner II. City-Environmental	0.00	0	0.00	0	0.00	0
30000385	Planner II. City-Land Use	2.00	136,896	1.00	68,448	1.30	88,980
30000375	Planner, Associate	2.00	113,160	1.00	56,580	2.15	121,656
30000393	Planner, Sr City-Land Use	0.83	65,540	1.00	78,648	1.00	78,648
30000396	Planner, Sr City-Transportation	1.00	78,648	1.00	72,768	1.00	72,768
30000724	Planner, Supervising	1.00	100,044	1.00	100,044	1.00	100,044
30001658	Plg & Sust Policy, Rsrch & Oper Mgr	0.92	106,491	1.00	120,936	1.00	120,936
30000464	Program Coordinator	1.00	67,416	0.00	0	0.00	0
30000466	Program Manager, Sr	1.00	75,108	0.00	0	0.00	0
30000462	Program Specialist, Assistant	1.90	88,860	1.50	96,886	1.50	96,886
<b>Total Limited Term Positions</b>		<b>30.05</b>	<b>\$1,978,783</b>	<b>22.00</b>	<b>\$1,546,111</b>	<b>23.95</b>	<b>\$1,668,187</b>
<b>Grand Total</b>		<b>115.55</b>	<b>\$7,907,876</b>	<b>104.25</b>	<b>\$7,574,197</b>	<b>102.90</b>	<b>\$7,494,253</b>

## **SOLID WASTE MANAGEMENT FUND**

### **FUND OVERVIEW**

The Solid Waste Management Fund accounts for expenses and revenues associated with the City's oversight of solid waste collection activities in Portland and the City's efforts to reduce the amount of solid waste through recycling and waste reduction.

The fund supports the Bureau of Planning and Sustainability's Solid Waste and Recycling, Green Building and Sustainable Education and Assistance programs. Revenue sources for the Solid Waste Management Fund include residential franchise, commercial tonnage, and permit fees.

### **FUND SUMMARY - SIGNIFICANT CHANGES FROM FY11-12**

N/A

## Summary of Fund Budget

	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Requested Without DP's	FY 2012-13 Requested Budget
<b>Solid Waste Management Fund</b>					
<b>Expenditures</b>					
Unappropriated Fund Balance	3,923,255	0	1,568,358	1,363,299	1,422,803
Personal Services	1,489,570	1,543,160	2,117,251	2,073,420	2,122,078
External Materials and Services	1,102,749	1,563,067	2,248,942	1,017,723	974,565
Internal Materials and Services	968,145	1,300,215	1,448,521	1,602,216	1,537,212
Debt Service	33,190	35,788	40,208	43,601	43,601
Fund Transfers - Expense	909,372	227,167	148,316	155,783	155,783
<b>Total Expenditures</b>	<b>8,426,281</b>	<b>4,669,397</b>	<b>7,571,596</b>	<b>6,256,042</b>	<b>6,256,042</b>
<b>Resources</b>					
Budgeted Beginning Fund Balance	4,319,203	0	3,178,244	1,646,642	1,646,642
Licenses & Permits	2,331,097	2,511,304	2,595,699	2,553,721	2,553,721
Charges for Services	1,504,536	1,571,893	1,605,148	1,975,099	1,975,099
Intergovernmental Revenues	60,691	23,839	26,000	26,000	26,000
Interagency Revenue	124,390	19,399	15,000	10,000	10,000
Fund Transfers - Revenue	1,681	1,628	101,082	0	0
Miscellaneous Sources	84,683	87,683	50,423	44,580	44,580
<b>Total Resources</b>	<b>8,426,281</b>	<b>4,215,747</b>	<b>7,571,596</b>	<b>6,256,042</b>	<b>6,256,042</b>

## Decision Package Summary

**Bureau:** Bureau of Planning & Sustainability

**Priority:** 04

**Type:** Reductions

**Decision Package:** PN\_01 - 4% reductions

**Program:** Bureau Operations, Planning & PRI

	FY 2012-13 Requested 1 Time DP	FY 2012-13 Requested Ongoing DP	FY 2012-13 Requested Total DP	FY 2013-14 Estimated Budget	FY 2014-15 Estimated Budget	FY 2015-16 Estimated Budget	FY 2016-17 Estimated Budget		
<b>EXPENDITURES</b>									
Unappropriated Fund Balance	0	59,504	59,504	0	0	0	0	0	0
Personal Services	0	(160,529)	(160,529)	0	0	0	0	0	0
External Materials and Services	0	(144,416)	(144,416)	0	0	0	0	0	0
Internal Materials and Services	0	(58,027)	(58,027)	0	0	0	0	0	0
<b>TOTAL EXPENDITURES</b>	<b>0</b>	<b>(303,468)</b>	<b>(303,468)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>REVENUES</b>									
Budgeted Beginning Fund Balance	0	0	0	0	0	0	0	0	0
Intergovernmental Revenues	0	0	0	0	0	0	0	0	0
General Fund Discretionary	0	(303,468)	(303,468)	0	0	0	0	0	0
<b>TOTAL REVENUES</b>	<b>0</b>	<b>(303,468)</b>	<b>(303,468)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>FTE</b>									
Full-Time Positions	0.00	-1.75	-1.75	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL FTE</b>	<b>0.00</b>	<b>-1.75</b>	<b>-1.75</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**Description:**

Staff cut of .25 FTE in Central City Plan project and 1.0 FTE in Comprehensive Plan project as well elimination of a planning management position. Staff cut in Central City program is compounded by need to shift staff from Central City Plan to Comp Plan to meet State-mandated deadline.

**Expected Results:**

Delays Central City Plan and reduces scope of work plan.



**Decision Package Summary**

**Bureau:** Bureau of Planning & Sustainability

**Priority:** 05      **Type:** Reductions

**Decision Package:** PN\_02 - 2% reductions to 6%

**Program:** Planning, Policy & Research

	FY 2012-13 Requested 1 Time DP	FY 2012-13 Requested Ongoing DP	FY 2012-13 Requested Total DP	FY 2013-14 Estimated Budget	FY 2014-15 Estimated Budget	FY 2015-16 Estimated Budget	FY 2016-17 Estimated Budget	
<b>EXPENDITURES</b>								
Personal Services	0	(114,878)	(114,878)	0	0	0	0	0
External Materials and Services	0	(29,408)	(29,408)	0	0	0	0	0
Internal Materials and Services	0	(7,448)	(7,448)	0	0	0	0	0
<b>TOTAL EXPENDITURES</b>	<b>0</b>	<b>(151,734)</b>	<b>(151,734)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>REVENUES</b>								
General Fund Discretionary	0	(151,734)	(151,734)	0	0	0	0	0
<b>TOTAL REVENUES</b>	<b>0</b>	<b>(151,734)</b>	<b>(151,734)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>FTE</b>								
Full-Time Positions	-0.10	-1.30	-1.40	0.00	0.00	0.00	0.00	0.00
<b>TOTAL FTE</b>	<b>-0.10</b>	<b>-1.30</b>	<b>-1.40</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**Description:**

Additional staff cut of 1.4 FTE in Central City Plan project.

**Expected Results:**

Requires reducing the scope of the Central City Plan and delaying completion by at least one year. This has negative impacts on development in central Portland, a major economic driver for the region.

## Decision Package Summary

**Bureau:** Bureau of Planning & Sustainability

**Priority:** 06

**Type:** Reductions

**Decision Package:** PN\_03 - 2% reductions to 8%

**Program:** Planning, Policy & Research

	FY 2012-13 Requested 1 Time DP	FY 2012-13 Requested Ongoing DP	FY 2012-13 Requested Total DP	FY 2013-14 Estimated Budget	FY 2014-15 Estimated Budget	FY 2015-16 Estimated Budget	FY 2016-17 Estimated Budget	
<b>EXPENDITURES</b>								
Personal Services	0	(114,930)	(114,930)	0	0	0	0	0
External Materials and Services	0	(36,804)	(36,804)	0	0	0	0	0
<b>TOTAL EXPENDITURES</b>	<b>0</b>	<b>(151,734)</b>	<b>(151,734)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>REVENUES</b>								
General Fund Discretionary	0	(151,734)	(151,734)	0	0	0	0	0
<b>TOTAL REVENUES</b>	<b>0</b>	<b>(151,734)</b>	<b>(151,734)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>FTE</b>								
Full-Time Positions	0.00	-1.15	-1.15	0.00	0.00	0.00	0.00	0.00
Limited Term Positions	-0.05	0.00	-0.05	0.00	0.00	0.00	0.00	0.00
<b>TOTAL FTE</b>	<b>-0.05</b>	<b>-1.15</b>	<b>-1.20</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**Description:**

Additional staff cut of 0.35 FTE in Central City program, 0.35 FTE in Comprehensive Plan project, and 0.5 FTE in Portland Plan implementation staff.

**Expected Results:**

Requires shifting Comprehensive Plan staff to Portland Plan implementation support, and requires downscaling of Comprehensive Plan update that can be prepared in time for the State-mandated Periodic Review deadline.

## Decision Package Summary

**Bureau:** Bureau of Planning & Sustainability

**Priority:** 01

**Type:** Unfunded Ongoing

**Decision Package:** PN\_04 - State-Mandated Comprehensive Plan

**Program:** Comprehensive Plan

	FY 2012-13 Requested 1 Time DP	FY 2012-13 Requested Ongoing DP	FY 2012-13 Requested Total DP	FY 2013-14 Estimated Budget	FY 2014-15 Estimated Budget	FY 2015-16 Estimated Budget	FY 2016-17 Estimated Budget		
<b>EXPENDITURES</b>									
Personal Services	123,078	0	123,078	0	0	0	0	0	0
External Materials and Services	435,922	0	435,922	0	0	0	0	0	0
<b>TOTAL EXPENDITURES</b>	<b>559,000</b>	<b>0</b>	<b>559,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>REVENUES</b>									
General Fund Discretionary	559,000	0	559,000	0	0	0	0	0	0
<b>TOTAL REVENUES</b>	<b>559,000</b>	<b>0</b>	<b>559,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>FTE</b>									
Limited Term Positions	1.50	0.00	1.50	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL FTE</b>	<b>1.50</b>	<b>0.00</b>	<b>1.50</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**Description:**

The City is under a State mandate to submit an updated Comprehensive Plan to the State Department of Land Conservation and Development (LCDC) by October 2013. Completion of the Comprehensive Plan update also is a priority action item in the Portland Plan. During the Portland Plan process, a significant amount of work has been completed on the Comprehensive Plan, but extensive technical analysis and integrating work remains. The requested add-package funds are for professional services to perform required technical analysis and facilitation. Funding will also continue the successful arrangement used in the Portland Plan, where BPS provides funding to the City's Diversity in Civic Leadership member organizations so they are able to assist with targeted outreach and engagement with their communities, groups that are typically underrepresented in City processes.

**Expected Results:**

These funds will enable the Comprehensive Plan to stay on schedule to meet the State-mandated deadline of October 2013.

**Decision Package Summary**

**Bureau:** Bureau of Planning & Sustainability

**Priority:** 03      **Type:** Unfunded Ongoing

**Decision Package:** PN\_05 - West Hayden Island

**Program:** Comprehensive Plan

	FY 2012-13 Requested 1 Time DP	FY 2012-13 Requested Ongoing DP	FY 2012-13 Requested Total DP	FY 2013-14 Estimated Budget	FY 2014-15 Estimated Budget	FY 2015-16 Estimated Budget	FY 2016-17 Estimated Budget	
<b>EXPENDITURES</b>								
Personal Services	51,018	0	51,018	0	0	0	0	0
<b>TOTAL EXPENDITURES</b>	<b>51,018</b>	<b>0</b>	<b>51,018</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>REVENUES</b>								
General Fund Discretionary	51,018	0	51,018	0	0	0	0	0
<b>TOTAL REVENUES</b>	<b>51,018</b>	<b>0</b>	<b>51,018</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>FTE</b>								
Limited Term Positions	0.50	0.00	0.50	0.00	0.00	0.00	0.00	0.00
<b>TOTAL FTE</b>	<b>0.50</b>	<b>0.00</b>	<b>0.50</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**Description:**  
 Funding is needed for additional staff time that is critical to complete the West Hayden Island project. This will involve an extended period of public outreach for hearings at the Planning and Sustainability Commission and City Council and tasks to finalize agreements and respond to potential appeals. The proposed add package would extend a Community Outreach Representative for six months.

**Expected Results:**  
 Final recommendation to City Council on West Hayden Island, which could include an annexation agreement, initial new zoning and Comprehensive Plan designations, and other implementing agreements.

## Decision Package Summary

**Bureau:** Bureau of Planning & Sustainability

**Priority:** 02

**Type:** Unfunded Ongoing

**Decision Package:** PN\_06 - Youth Planning

**Program:** Youth Planning

	FY 2012-13 Requested 1 Time DP	FY 2012-13 Requested Ongoing DP	FY 2012-13 Requested Total DP	FY 2013-14 Estimated Budget	FY 2014-15 Estimated Budget	FY 2015-16 Estimated Budget	FY 2016-17 Estimated Budget		
<b>EXPENDITURES</b>									
Personal Services	95,274	0	95,274	0	0	0	0	0	0
External Materials and Services	53,726	0	53,726	0	0	0	0	0	0
<b>TOTAL EXPENDITURES</b>	<b>149,000</b>	<b>0</b>	<b>149,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>REVENUES</b>									
General Fund Discretionary	149,000	0	149,000	0	0	0	0	0	0
<b>TOTAL REVENUES</b>	<b>149,000</b>	<b>0</b>	<b>149,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>FTE</b>									
Full-Time Positions	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL FTE</b>	<b>1.00</b>	<b>0.00</b>	<b>1.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**Description:**

The Youth Planning Program hires youth ages 14-21 to work alongside planners and sustainability professionals. Engaging youth in planning and civic life in an empowered way is our goal. Youth 18 and under make up one quarter of Portland's population, while youth 25 and under make up one third. The funding will support a program coordinator, three youth interns, and interactions with youth in a variety of community and policy forums.

**Expected Results:**

The add package implements part of the Portland Plan, specifically support for career pathways for youth and incorporation of underrepresented voices, such as those of youth, found in the plan's Equity Framework and Thriving Educated Youth strategy. Youth voices will be incorporated into the development of the Comprehensive Plan. The funding will also result in the continuation of successful community-based projects with David Douglas and other school districts and greater coordination between the city Planning and Sustainability Commission and Multnomah County Youth Commission.

# Planning and Sustainability

## Management Data

Commissioner in Charge: Sam Adams  
 Bureau Director: Susan Anderson  
 Website: www.portlandonline.com/bps  
 Percent Administration: 9.3%  
 Percent M/W/ESB Contract \$: 7.1%  
 Prime & 0.0% Sub: n.a.

## Workforce Data

Minorities: 20.18%  
 Female: 63.3%  
 Non-Represented: 62.4%  
 Span of Control: 5 positions per supervisor  
 Management Layers: 1 to 4

## Resource and FTE Summary

	FY 2011-12 Adopted	FY 2012-13 Base	FY 2012-13 Reductions	FY 2012-13 Add Packages	FY 2012-13 Requested
GF Ongoing	\$7,367,958	\$7,586,689	\$606,936	\$0	\$6,979,753
GF One-Time	889,427	0	0	759,018	759,018
GF Overhead	556,665	529,061	0	0	529,061
Grants & IGA	15,133,747	8,326,083	0	0	8,326,083
Other Revenues	6,829,540	6,332,542	0	0	6,332,542
<b>Total Revenues</b>	<b>\$30,777,337</b>	<b>\$22,774,375</b>	<b>\$606,936</b>	<b>\$759,018</b>	<b>\$22,926,457</b>
FTE	109.60	104.25	4.35	3.00	102.90

## Bureau Overview and Significant Issues

### **Bureau Mission**

Create a prosperous, equitable and healthy city. To do this, we build partnerships; engage, inspire and educate residents and businesses; and advance policy, programs, plans, regulations and urban design that foster both innovation and practical solutions.

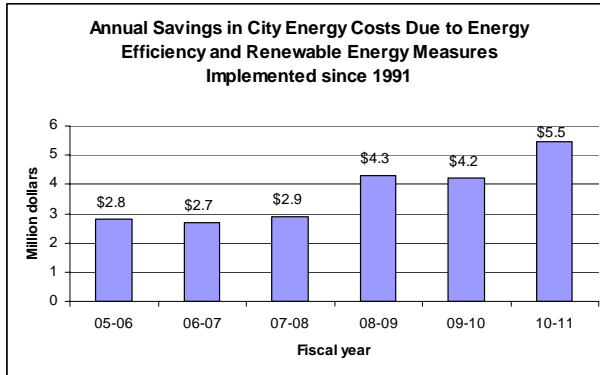
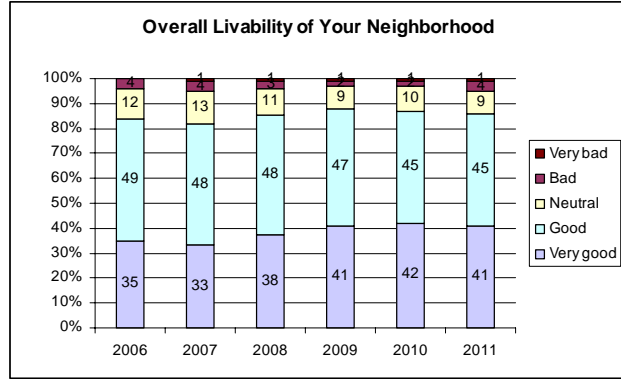
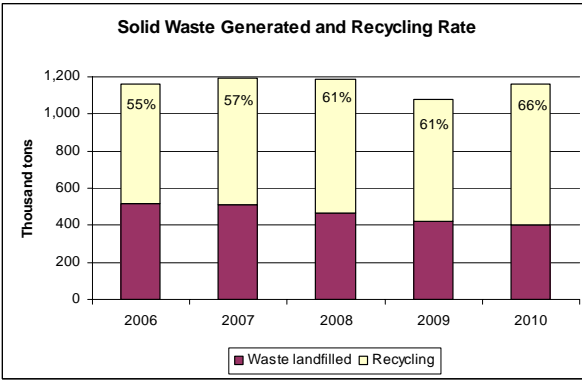
### **Bureau Overview**

To create and enhance a vibrant city, BPS combines the disciplines of planning and sustainability to advance Portland's diverse and distinct neighborhoods, promote a prosperous and low-carbon economy, and help ensure that people and the natural environment are healthy and integrated into the cityscape. BPS provides a forum for community engagement and education and is a catalyst for action. With our partners, BPS develops creative yet practical solutions on issues as far ranging as comprehensive, neighborhood and environmental planning, urban design, waste reduction and recycling, energy efficiency and solar technologies, and historic preservation. This innovative, interdisciplinary approach strengthens Portland's position as an international model of sustainable development.

BPS's core on-going projects and programs provide technical assistance and support to businesses, residents and public agencies citywide, especially related to sustainability, development and planning issues. In April 2012, BPS will complete the Portland Plan, the city's strategic plan. Beginning in FY12-13, BPS will retain a role in implementation and monitoring of the plan. BPS is also in the midst of developing a new Comprehensive Plan for the city in response to the State's periodic review requirements and to provide a plan for city growth and development over the next 25 years in a way that helps achieve the community needs and aspirations expressed in the Portland Plan.

Many of BPS's major planning efforts have been funded with one-time General Fund, which has caused considerable volatility to BPS resources.

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**Operating Requirements**

	FY 2010-11 Actuals	FY 2011-12 Adopted	FY 2012-13 Base	FY 2012-13 Request	FY 2013-14 Estimate
Operating - Base	\$11,514,063	\$12,947,251	\$12,927,913	\$12,261,473	\$12,309,082
Operating - One-Time Initiatives	9,595,931	16,261,728	8,483,163	9,242,181	2,795,018
Unappropriated Ending Balance	3,254,528	1,568,358	1,363,299	1,422,803	1,066,212
<b>Total</b>	<b>\$24,364,522</b>	<b>\$30,777,337</b>	<b>\$22,774,375</b>	<b>\$22,926,457</b>	<b>\$16,170,312</b>

**Overview of Major Projects and Initiatives**

**Project/Initiative Title:** Portland Plan/Comprehensive Plan

As part of the State-mandated periodic review and update of the City's Comprehensive Plan, this project will create a strategic framework for the City, its partners and 18 other government agencies that affect Portland. The Portland Plan, which is a new strategic plan for the City, will be complete by the end of the fiscal year, with City Council hearings scheduled for April 2012. The Comprehensive Plan will move into a public discussion phase in the beginning of FY12-13 and is scheduled to be complete in October 2013. To meet this deadline, we anticipate that there will be a significant work program of refinement plans needed to develop certain elements of the adopted Comprehensive Plan. These refinement plans will likely include updates to sections of the City's development and zoning codes.

**Project/Initiative Title:** District Planning

Assigned to each of five districts within Portland outside of the Central City, District Liaisons serve as problem solvers, technical advisors and advocates for residents, business owners and employees, youth, institutions, non-profit organizations, property owners, and others engaged in improving Portland's quality of life. Staff from this program will play a lead role in development of the City's new Comprehensive Plan. Staff from the District

Planning program also have lead or support roles in other major projects in their districts. In FY12-13 this will include the SW Barbur Boulevard Concept Plan, Station Area Development planning and the Portland Bureau of Housing citywide housing strategy. In FY11-12, the District Planning program played significant roles in work on the Portland Plan and Comprehensive Plan update as well as specific projects including zoning changes related to SE 122nd Avenue, Cully Main Street and Food Production citywide.

**Project/Initiative Title:** Climate and Clean Energy

The 2009 Climate Action Plan directs BPS to carry forward a range of policies and programs that reduce emissions, create jobs and advance equity. A status report on the first two years of implementation will be released in spring 2012 and is expected to show significant progress. Local leadership on climate change is especially critical given the lack of decisive national action, and Portland's history of action on climate continues to position local businesses strongly to compete in the global transition to a low-carbon economy. In FY12-13, key projects include a new initiative to improve performance in commercial buildings, accelerating Clean Energy Works, the home energy tune-up financing program, supporting ecodistrict efforts, evaluating the impact of Portland's new residential food-scrap collection system, and helping businesses reduce operating costs and adopt sustainability practices.



**Program Summary  
Bureau of Planning and Sustainability**

1. Program Title Manager Phone #	2. Program Description	3. Staff (FTE)		4. Requirements		5. Percent Admin	6. Resources				7. Output and Efficiency Measure(s)	8. Program Rankings	
		Regular	Limited Term	Operating	Capital		General Fund	Rates, Fees & IAs	Federal, State & Local	Other		Core	Community
District Planning and Area Projects Deborah Stein 503-823-6991	District Planners provide planning services to each of five community districts. This includes serving as problem solvers, technical advisors and advocates for residents, business owners and employees, youth, institutions, non-profit organizations, property owners, and others engaged in improving Portland's quality of life. Staff from this program play lead roles in area planning projects as well as major Bureau projects such as Portland Plan and the new Comprehensive Plan.	7.9	2.00	1,230,449			925,390		305,059		Number of community meetings attended FY 2010-11 Actuals: 580 FY 2012-13 Target: 580  Neighborhood Livability rating - % good or very good FY 2010-11 Actuals: 90% FY 2012-13 Target: 90%	2	2
Central City and Urban Design Program Steve Iwata 503-823-9904	Central City program provides planning services to Portland's Central City. This includes services similar to those the District Planning program provides neighborhoods. The Urban Design Studio provides professional design and planning services to all Bureau projects as well as to other City Bureaus and projects developed by other public agencies. In FY 12-13 the Central City program will continue to develop a new plan for Portland's Central City (CC2035) and, in coordination with PDOT, the Central City Transportation Management Plan. CC2035 will be part of the City's new Comprehensive Plan. The Urban Design Studio also is playing a major role in Portland Plan, the new Comprehensive Plan and CC20325.	8	2.00	1,181,777			791,409		390,368		% milestones met on Central City Plan FY 2010-11 Actuals: 60% FY 2012-13 Target: 100%  How is the City doing in making downtown a good place for recreation, shopping, living and working? % good or very good FY 2010-11 Actuals: 58% FY 2012-13 Target: 65%	3	5
Portland Plan / Comprehensive Plan Program Eric Engstrom 503-823-3329	Develop a strategic plan for how Portland will change over the next 25 years. The strategy will include both long term measurable goals and a 5-year action plan. The Portland Plan will help us identify shared priorities in partnership with the other agencies that have responsibility within the boundaries of the City (Trimet, Multnomah County, school districts, etc.). Also, continue work on development of a new Comprehensive Plan for the City based on the output of the Portland Plan as well as guided by other adopted plans and policies of City agencies.	7	1.00	1,076,552			976,552		100,000		# of public participant in Portland Plan process FY 2010-11 Actuals: 3,635 people (includes attendance at fairs, lecture series, workshops, small group hosted presentations)* * in addition, we received 6,500 survey responses. FY 2012-13 Target: 2,500 people directly engaged in the Comprehensive Plan (workshops, open houses, hosted presentations, hearings).  % of milestones met on Comprehensive Plan FY 2010-11 Actuals: 50% (one of Two) We completed and obtained state acceptance of several public involvement monitoring reports. The background reports are the next major milestone, which were to be completed in FY 10/11. The state granted us an extension. We now anticipate City Council adoption of the reports no later than July 2012 (shortly after Portland Plan adoption).  FY 2012-13 Target: 100% Two major products must be completed in FY 12/13 - the Background Reports, and the Scenarios Report.	1	1
River and Watershed Planning Sallie Edmunds 503-823-6950	Leads update of the Willamette Greenway Plan, including refining code, investment priorities, and programs. Work on the Central Reach of the Willamette River is done in conjunction with CC2035. Work on the South Reach begins in FY 12-13. Work on the North Reach will be adopted as part of the City's new Comprehensive Plan.	4.7		519,234			519,234				% Central Reach completed FY 2010-11 Actuals: 20% FY 2012-13 Target: 50%  # of Natural Resource Program product milestones met (e.g., natural resource inventories, ESEE analyses, code updates, policy proposals, non-regulatory resource management tools) FY 2010-11 Actuals: 7 FY 2012-13 Target: 6	7	4
General Planning / Code Development Sandra Wood 503-823-7949	Coordinates the City's Regulatory Improvement Workplan, edits code, monitors outcomes. Leads or consults on code change projects.	8.55		1,028,169			1,028,169				# of code and general planning projects completed FY 2010-11 Actuals: 7 FY 2012-13 Target: 0  Quality of City planning for future land use. % good or very good FY 2010-11 Actuals: 40% FY 2012-13 Target: 50%	5	10
Youth Planning Program Deborah Stein 503-823-6991	BPS's Youth Planning Program brings youth into the City's planning programs through outreach and the participation of youth interns in projects in response to critical issues.										Youth engaged in planning projects FY 2010-11 Actuals: 250 FY 2012-13 Target: 300  Community members involved in Youth Grants program FY 2010-11 Actuals: 5000 youth, 100 adults FY 2012-13 Target: 8000 youth, 150 adults	15	13
Policy Analysis & Research Steve Dotterer 503-823-7731	Provide research and policy analysis in support of the City's long-range development and current issues. Specific policy areas include historic resources, economic analyses, asset management and infrastructure policy, and housing policy analysis including demographics.	7		737,137			737,137				% of milestones met in producing annual City Infrastructure Asset Management Report FY 2010-11 Actuals: 100% FY 2012-13 Target: 100%  # of projects provided with formal review of historic resources FY 2010-11 Actuals: 10 FY 2012-13 Target: 12	3	9
Energy and Climate Policy Michael Armstrong 503-823-6053	Develop policy and seek funding to reduce carbon emissions and prepare for a changing climate. Monitor and report on progress in implementing the City's Climate Action Plan.	1	2.00	455,744			124,712	289,254	41,778		% of Climate Action Plan actions completed or on track FY 2010-11 Actuals: 75% FY 2012-13 Target: 75%  % reduction in per capita carbon emissions from 1990 levels FY 2010-11 Actuals: 23% FY 2012-13 Target: 27%	8	8
Clean Energy Andria Jacob 503-823-7616	Implement energy efficiency and renewable programs that create local jobs and reduce energy bills and carbon emissions.	0.6	4.50	6,489,975					6,489,975		# homes weatherized FY 2010-11 Actuals: 1,000 FY 2012-13 Target: 2,500  # solar energy systems installed since 2006 FY 2010-11 Actuals: 2,200 FY 2012-13 Target: 3,000  Per capita residential energy use in million BTUs FY 2010-11 Actuals: 29 FY 2012-13 Target: 27	9	7

Solid Waste Policy & Operations Bruce Walker 503-823-7772	Regulate hauler services to increase recycling levels in residential and commercial sectors. Complete implementation steps for system wide changes to residential and commercial programs, including coordination with Outreach team. Expand collection of food scraps to multifamily residential sector.	9.5	1.00	2,401,886			2,035,029	196,881	169,976	Tons of solid waste collected FY 2010-11 Actuals: 1,162,400 FY 2012-13 Target: 1,000,000  % material diverted from waste stream FY 2010-11 Actuals: 72% FY 2012-13 Target: 73%	6	3	
Sustainable Food Steve Cohen 503-823-4225	Strengthen the local food system by increasing local purchasing from regional growers, processors, and suppliers and working to make healthy, affordable food available throughout the community. Serve as liaison to farmers' markets, assist businesses in sourcing food locally, and provide gardening and related classes for residents.	1		113,862			113,862			# of residents participating in urban food production projects FY 2010-11 Actuals: 9000 FY 2012-13 Target: 9,000	11	10	
Green Building & Development Alisa Kane 503-823-7082	Develop policy and provide technical support for sustainable building practices in commercial and residential projects and ecodistricts. Key services include project-by-project technical assistance, training, outreach, and educational resource development.	4.75	2.00	872,317			144,186	549,475	178,656	# of businesses and residents assisted with green building FY 2010-11 Actuals: 1,163 FY 2012-13 Target: 1,000  % of commercial new construction square footage meeting green building standards FY 2010-11 Actuals: 55% FY 2012-13 Target: 60%	12	14	
Business Sustainability Outreach Jill Kolek 503-823-7590	Design and execute events, campaigns, projects and programs that provide recognition, information and assistance to businesses, organizations, schools and government facilities. The program informs and encourages behavior change in social and environmental sustainability, with a focus on waste, energy, water and transportation.	7.1	3.25	1,450,610			68,964	1,145,000	236,646	The program interacts with over 5000 businesses and provides direct resources, technical assistance and training at over 500 business annually. Full assistance will be provided to over 150 businesses a year, which includes assessment of business' current activities and recommendations for additional activities. By end of the FY 12-13, the program will recognize at least 75 businesses through certification. FY 2010-11 Actuals: 1000 FY 2012-13 Target: 1000  % of commercial material diverted from waste stream FY 2010-11 Actuals: 67% FY 2012-13 Target: 70%	10	10	
Residential Sustainability Outreach Jill Kolek 503-823-7590	Develop and implement programs, projects, events and educational campaigns to engage a diverse range of residents in new behaviors and organizational practices in the areas of waste reduction and recycling, climate action, thoughtful consumption and overall sustainability practices.  Support the following initiatives: Be Cart Smart-- community outreach campaign engaging residents about curbside recycling and composting services. Be Resourceful: Save more, live more-- values-based campaign focusing on thoughtful consumption. Fix-it Fairs-- coordinate three events a season targeting low to middle income homeowners which are racially and culturally diverse. The Fairs offer free access to community resources and educational opportunities. ReTHINK workshops series--designed to engage Portlanders around sustainable and climate protection activities. One diverse community organization is selected to host the workshops and then conduct a community action project that will reduce greenhouse emissions. Master Recycler Program trains community volunteers through a series of workshops in waste prevention Multifamily waste reduction program--provide technical assistance and educational materials to residents	2.5	1.75	855,294			201,774	578,875	72,396	2,250	Residents reached by sustainable training and outreach Recruit, train and mobilize about 75 volunteers to engage Portlanders in over 25,000 conversations about waste reduction, climate action and sustainability--through events, presentations and trainings. Partner with local community organizations and businesses such as Reuse PDX around the Better Living Show and the Reuse Alliance to coordinating the International conference. Update Be Resourceful educational materials to reflect research findings. Recruit two diverse grass roots communities organization to host ReTHINK. Have 30-40 attendees per workshop with half attendees attend multiple workshops. Host three Fix It Fairs with over 2,000 total attendees that reflect the demographics of the neighborhood the event is held in. Provide direct assistance to 20,000 multifamily units regarding waste reduction education and implementation of food scrap collection pilot. FY 2010-11 Actuals: 90,000 FY 2012-13 Target: 90,000  % of residential material diverted from waste stream FY 2010-11 Actuals: 51% FY 2012-13 Target: 54%	13	6
Sustainable City Government Jill Kolek 503-823-7590	BPS provides assistance and coordination role to city bureaus in their sustainability efforts through Sustainable City Government Partnership Liaisons.									Coordinate bureau liaison meetings which will provide training, goal setting and problem solving on sustainability-related issues Publish a Sustainable City Progress Report Help to define and refine social sustainability actions for city operations Develop a communications strategy to share stories about sustainable city operations  Number of bureaus assisted with sustainability practices: FY 2010-11 Actuals: 20 FY 2012-13 Target: 25  Utility savings to City in millions of dollars, adjusted FY 2010-11 Actuals: \$4.3 FY 2012-13 Target: \$5.4	14	15	
Director's Office Susan Anderson 503-823-6800	Bureau leadership and management. Oversees Planning and Sustainability Commission.	2		352,035		100%	352,035			Grants and contracts awarded to BPS FY 2010-11 Actuals: \$6.2 million FY 2012-13 Target: \$7.9 million	NA	NA	
Bureau Operations (Budget, Finance, HR) Michael Armstrong 503-823-6053	Provide financial, budget, personnel and administrative services for the bureau.	7.4	1.00	698,374		100%	654,016		44,358	% of bureau expenditures on administration FY 2010-11 Actuals: 15% FY 2012-13 Target: 14%	NA	NA	
Communications Julia Thompson 503-823-0229	Provides communications services for the bureau, including media relations, public information, materials production, website development, and event messaging.	2	1.50	390,266		100%	390,266			# of website hits annually FY 2010-11 Actuals: 2,898,000 FY 2012-13 Target: 2,900,000  BPS-sent press releases FY 2010-11 Actuals: 90 FY 2012-13 Target: 80	NA	NA	
Technical Services Kevin Martin 503-823-7710	Provides GIS, graphic design and website development services for all BPS programs and occasionally to other Bureaus or City programs. Manages Bureau technology needs with BTS.	1.25		124,897		100%	124,897			Measure Title: number of completed project requests FY 2010-11 Actuals: FY12-13 first year data collected FY 2012-13 Target: 200  Measure Title: percentage of "on-time" requests FY 2010-11 Actuals: FY12-13 first year data collected FY 2012-13 Target: 90%	NA	NA	
Bureau Operating Costs	Costs associated with bureau operations, primarily interagencies with OMF bureaus.			1,233,114		32%	963,148		269,966	NA	NA	NA	
Fund Level Expenses	This line contains the total fund level expenses, which includes all debt service, cash transfers, contingency, and unappropriated fund balance.	NA	NA	1,562,683		NA		43,687	1,518,996	NA	NA	NA	
<b>Total</b>		<b>82.25</b>	<b>22.00</b>	<b>22,774,375</b>		<b>-</b>	<b>9.3%</b>	<b>8,115,750</b>	<b>4,641,320</b>	<b>8,326,083</b>	<b>1,691,222</b>		

# Customer Service Improvement Status Report

## 1. Bureau of Planning and Sustainability FY12-13 Service Improvement Plan: Outreach to Diverse Communities

BPS is committed to integrating the social elements of sustainability into all aspects of its programs, policies and plans. BPS is in the process of developing a community engagement best practices manual that includes the public in planning, policy and implementation and incorporates the City's adopted public involvement principles. The goal of the manual is to increase community capacity to address relevant issues, plan for the future and engage in sustainable practices while also increasing Bureau capacity to proactively address public involvement inequities and challenges. This plan will create the framework for greater collaboration, innovation and efficiencies. The results will be richer community contributions to the City's work and stronger and more productive relationships to build on going forward.

Efforts to address equity in specific BPS programs include the following:

- Equity, in terms of a focus on removing barriers to equal opportunity and reducing disparities particularly among racial and ethnic groups, has emerged as an overarching goal of the Portland Plan. It will be used as a key criterion for judging the success of all of the plan's strategies as well as the subject of a specific initiative. The Comprehensive Plan project will continue the working relationship with the Diversity in Civic Leadership Organizations, established in the Portland Plan.
- The continued implementation of a Community Workforce Agreement as part of the Clean Energy Works program, which is on track to achieve its goals for living wage jobs, percent of hours worked by women and minorities, percent of project dollars to M/W/ESB contractors and related targets.
- Ongoing work to diversify participant involvement in events and programs through community engagement and partnership development in the BEST Awards, Fix-It Fairs and Sustainability at Work business assistance program.
- The ReTHINK workshop series focuses on recruiting diverse Portlanders to engage in sustainability and climate protection activities. Two grassroots organizations serving diverse communities will be selected to host the workshop series and then conduct a community action project that will reduce greenhouse gas emissions. Grants of up to \$1,500 will be awarded to help fund the host community's action project linked to at least one of the action areas presented in the workshop.
- The Bureau's District Planning Program continues its work on supporting community-defined initiatives such as the Cully/Concordia action plan, and on outreach to groups that have been previously underrepresented in BPS' work.
- The Youth Planning Program continues to be a means of bringing the underrepresented voices of youth, especially youth from communities of color, into City planning and decision-making.

## 2. Public Engagement on Climate Action

Slowing climate change is a global priority of unparalleled urgency. Portland has made notable progress in reducing emissions, but efforts must accelerate dramatically to achieve the goals of the Climate Action Plan, adopted by City council in 2009. Portland residents and businesses have historically been quick to adopt environmentally responsible practices, and BPS sees a need and opportunity to harness this capacity to accelerate carbon-reduction work. Evidence suggests that Portlanders want to make these changes but need clear, easily accessible information and consistent motivation to take action. In addition, Portland businesses have recognized a significant opportunity to produce products and services that help reduce greenhouse gas emissions.

In 2010 BPS launched the initial phase of a public engagement campaign, called Climate Action Now! ([www.portlandclimateaction.org](http://www.portlandclimateaction.org)), that addresses both carbon reduction and waste prevention. The campaign will continue to expand in FY 12-13 with goals to:

- Support behavior change among Portland residents to reduce carbon emissions in the areas of:
  - Home Energy (retrofit homes, renewable energy)
  - Transportation (minimize vehicle trips)
  - Consumption and Recycling (reduce waste, compost and promote low-carbon consumption)
  - Sustainable Food (choose local, grow food, reduce red meat consumption)
- Create unifying campaign umbrella that aligns BPS and relevant City efforts to deliver and co-market existing programs, leveraging and increasing the visibility for efforts of community groups and core partners.
- Educate residents, including those not traditionally involved, about the basics of climate change and the opportunities they have to take personal actions.

The primary outreach arm of the Portland Climate Action Now! campaign is the website blog, which received over 45,000 visits in 2011, up from just over 11,000 in 2010. The blog features weekly posts in the topic areas listed above, focusing on specific actions Portland residents can take to reduce their impact on climate change.

## **PART I – OVERVIEW**

### **BUREAU MISSION**

In 2009, City Council created the Bureau of Planning and Sustainability (BPS) by merging the Bureau of Planning and the Office of Sustainable Development. BPS has since conducted a strategic planning process to establish the strategic direction and core values of the new bureau. The mission of BPS is:

To create a prosperous, equitable and healthy city. To do this, we build partnerships; engage, inspire and educate residents and businesses; and advance policy, programs, plans, regulations and urban design that foster both innovation and practical solutions.

### **BUREAU PROGRAMS**

BPS is organized into the following three major functional areas, each of which has a number of significant programs and policy responsibilities.

**Planning and Urban Design Division:** Provides strategic, comprehensive, long-range and district planning and urban design services. Efforts include:

- Comprehensive Plan / Periodic Review
- Portland Plan
- Central Portland Plan
- River and Watershed Planning
- Code Development
- District Planning
- Environmental Planning
- Metro and State Land Use Coordination
- Special Projects such as West Hayden Island, Citywide Tree Project and Airport Futures
- GIS and Graphics

**Policy, Research and Innovation Division:** Provides research and analysis, policy and program development, project demonstration, monitoring and evaluation, and grant writing. Key program areas include:

- Economic Development
- Asset Management
- Solid Waste and Recycling Operations
- Historic Resources
- Green Building and Development
- Demography and Housing
- Human Health and Food
- Clean Energy Policy and Programs
- Climate Change Policy and Planning

**Sustainability Education and Assistance Division:** Develops and implements programs, events and educational campaigns to engage a diverse range of residents and businesses in

household and operational practices in the areas of climate action, waste reduction, recycling and overall sustainability practices. Key audiences and initiatives include:

- Business and government services
- Residential services
- Business recognition
- Outreach and events

Additionally, the bureau has three organizational units, Operations, Communications and the Director's Office, that provide bureau-wide services. The Director's Office provides leadership within the bureau, City and a broad range of local, regional, national, and international stakeholders and partners. The Communications team provides communications services for the bureau, including media relations, public information, materials production, and website development. The Operations staff provides administration, business services, technical services and other central functions bureau-wide to ensure efficient, effective operation of the organization.

### **BUDGET ISSUES FOR FY 2012-13**

The Bureau of Planning and Sustainability's overall budget reflects a diversified mix of revenue sources. However, the bureau's long-range planning programs have historically been funded overwhelmingly by General Fund (GF) resources. In recent years, ongoing GF resources allocated to the bureau's planning programs have been insufficient to carry out BPS's workload, and City Council has relied on General Fund one-time resources to supplement the bureau's core funding. In FY 08-09, for example, Council approved \$3.3 million in GF one-time for the Bureau of Planning. In FY 11-12, BPS's Adopted Budget included \$878,000 of GF one-time resources--a loss of \$2.4 million from FY 08-09 which supported staff, contracts and interagency agreements.

These reductions have been partly mitigated by the Citywide Overhead Committee's decision to provide annual support of \$403,715 for BPS's District Planning program through Citywide Overhead.

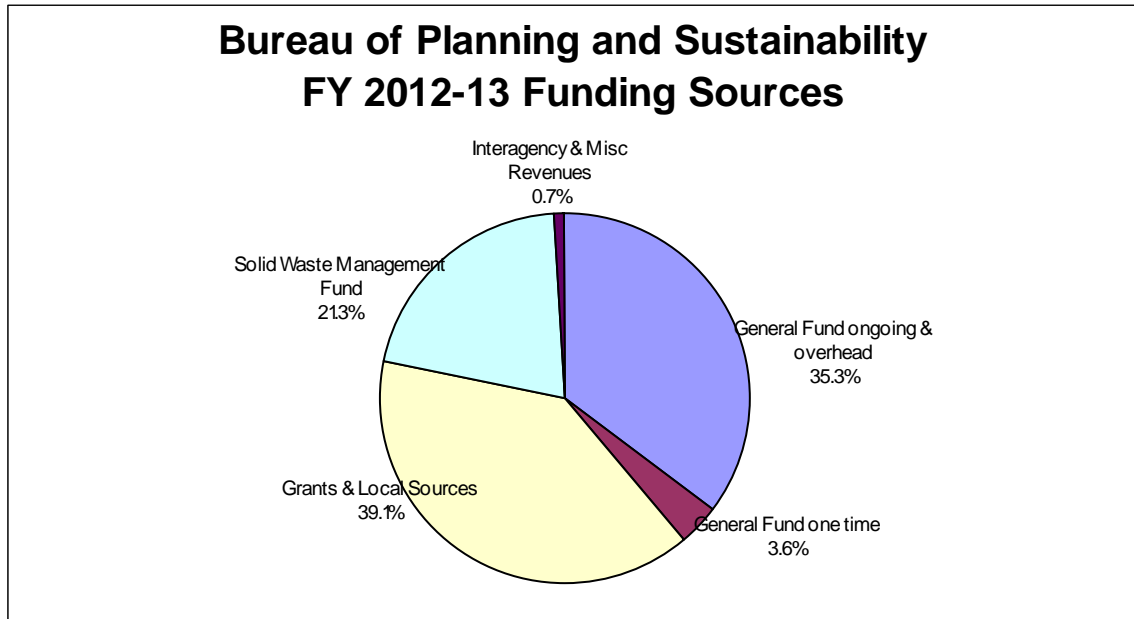
For FY 12-13 BPS's Requested budget includes add packages totaling \$759,000 in requests for one-time GF resources. Reflected in these add packages are 3 FTE and funds for critical technical contracts.

The \$403,715 requested in on-going GF responds to a FY 10-11 budget note, which asked OMF and BPS to identify ways to reduce BPS' dependence on volatile one-time General Fund support. OMF and BPS worked with the Citywide Overhead Committee to secure \$403,715 in support for BPS' District Planning program through Citywide Overhead. At the same time, OMF reduced BPS' allocation of on-going General Fund by the same amount. This decision package restores BPS' previous allocation of on-going General Fund. Without it, BPS would remain as dependent on one-time resources as ever.

## **PART II – REVENUES**

**FIVE-YEAR REVENUE FORECAST – Current Service Level**

Revenue Source	FY 2010-11	FY 2011-12	Year 1	Year 2	Year 3	Year 4	Year 5
	Actual	Revised	FY 2012-13 Requested	FY 2013-14 Projected	FY 2014-15 Projected	FY 2015-16 Projected	FY 2016-17 Projected
General Fund Discretionary - ongoing	6,762,341	7,367,958	6,979,753	6,979,753	6,979,753	6,979,753	6,979,753
General Fund Discretionary - one-time	951,463	1,114,542	759,018	759,018	759,018	759,018	759,018
General Fund Overhead	152,950	556,665	529,061	529,061	529,061	529,061	529,061
Grants	6,960,324	14,131,477	7,950,083	1,500,000	1,500,000	1,500,000	1,500,000
Local Sources	1,004,648	833,695	376,000	376,000	376,000	376,000	376,000
Solid Waste Residential Franchise Fees	2,494,154	2,578,199	2,536,221	2,569,364	2,603,933	2,638,635	2,673,832
Solid Waste Commercial Tonnage & Permit	1,589,209	1,622,648	1,992,599	2,009,217	2,283,663	2,326,429	2,372,608
Interagency Revenue	474,761	138,539	112,500	115,000	115,000	115,000	115,000
Misc. Revenue	105,219	50,423	44,580	45,000	45,000	45,000	45,000
Cash Transfer Revenue	99,516	101,082	-	-	-	-	-
Beginning Fund Balance	3,769,937	3,178,244	1,646,642	1,287,899	1,066,212	978,430	795,431
<b>Total</b>	<b>24,364,522</b>	<b>31,673,472</b>	<b>22,926,457</b>	<b>16,170,312</b>	<b>16,257,640</b>	<b>16,247,326</b>	<b>16,145,703</b>



**ASSUMPTIONS FOR REVENUE FORECAST**

Revenue Source	Projection Assumptions
General Fund ongoing	Year 1 - Requested Amount approved Yrs 2-5: No change.
General Fund one-time	Year 1 - Requested Amount approved Yrs 2-5 No change.
General Fund Overhead	Years 1-5: No change
Grants	Year 1 - Requested Amount approved Yrs 2-5 flat at \$1,500,000
Local Sources	Year 1 - Requested Amount approved Yrs 2-5 flat at \$376,000
Solid Waste Residential Franchise	SWMF Five-Year Plan
Solid Waste Commercial Tonnage & Permit Fees	SWMF Five-Year Plan
Interagency Revenue	Year 1 - Requested Amount approved Yrs 2-5 flat at \$115,000
Misc. Revenues	Year 1 - Requested Amount approved Yrs 2-5 flat at \$45,000

**GRANTS**

In FY 2011-12, the Bureau of Planning and Sustainability has the following active grants:

<u>Granting Agency</u>	<u>Amount</u>	<u>Purpose</u>
Metro GDRC	\$85,000	Green Development Resource Center
ARRA Energy Block	\$351,000	Energy Efficiency
ARRA Solar Market	\$156,000	Solar Market Transfer
ARRA ODOE	\$1,800,000	Clean Energy Works
ARRA BetterBuilding	\$10,000,000	Clean Energy Works
ARRA Communities to Work	\$97,000	Communities to Work
OMSI Sustainability	\$13,000	Sustainability exhibit development
Metro Recycle	\$734,000	Recycle at Work and Waste Reduction
Metro MR	\$35,000	Master Recycler Program
Metro BIG	\$8,000	Build It Green Tour
Metro Residential Compost	\$10,000	Compost Pilot
Metro MF Recycling	\$16,000	Multifamily Recycling
CET-SW Corridor	\$498,000	SW Corridor Concept Plan
CET-Brownfield	\$150,000	Brownfield Assessment
ODOT TGM Main St.	\$90,000	TGM Main St.

**Risks to Grant Funding**

Metro grant funding will decline by \$182,000 from previous years in FY12-13, but there is relatively low risk that these grants will decrease further in the near future. Other grant sources are less predictable and depend on how funding opportunities align with the Bureau's workplan priorities. In particular, the large federal ARRA grants have enabled BPS to carry out priority energy programs at an unprecedented scale and pace, but continued funding beyond 2013 is unlikely. BPS expects to continue to aggressively pursue grants for planning and sustainability projects, particularly for planning projects addressing economic, social and environmental sustainability.

**PART III – EXPENDITURES****FIVE-YEAR PROGRAM EXPENDITURE FORECAST**

Program	FY 2010-11	FY 2011-12	Year 1	Year 2	Year 3	Year 4	Year 5
	Actual	Revised	FY 2012-13 Requested	FY 2013-14 Projected	FY 2014-15 Projected	FY 2015-16 Projected	FY 2016-17 Projected
Central City and Urban Design Program	1,233,632	1,110,815	980,284	980,284	980,284	980,284	980,284
District Planning and Area Projects	1,082,834	1,471,905	1,195,835	1,195,835	1,195,835	1,195,835	1,195,835
River and Watershed Planning	583,378	544,036	519,234	519,234	519,234	519,234	519,234
Portland Plan / Comprehensive Plan Update Program	1,475,052	2,503,237	1,572,906	1,572,906	1,572,906	1,572,906	1,572,906
General Planning / Code Development	849,392	903,234	909,771	909,771	909,771	909,771	909,771
Youth Planning Program	54,351	70,444	149,000	149,000	149,000	149,000	149,000
Policy Analysis & Research	815,369	876,117	776,217	776,217	776,217	776,217	776,217
Solid Waste Policy & Operations	2,364,226	2,208,294	2,401,886	2,358,852	2,434,295	2,507,866	2,570,431
Business Sustainability Outreach	1,233,852	1,309,279	1,450,610	1,491,227	1,532,981	1,575,904	1,620,030
Residential Sustainability Outreach	681,554	1,443,734	855,295	879,243	903,862	929,170	955,186
Energy and Climate Policy	281,836	333,881	380,744	380,744	380,744	380,744	380,744
Clean Energy	5,346,446	12,186,576	6,489,975	-	-	-	-
Green Building & Development	855,078	872,019	898,659	901,299	912,015	922,773	933,684
Sustainable Food	104,786	122,244	113,862	113,862	113,862	113,862	113,862
Communications	553,313	609,851	390,266	390,266	390,266	390,266	390,266
Director's Office	458,863	339,960	352,035	352,035	352,035	352,035	352,035
Bureau Operations (Budget, Finance, HR, IT, GIS and G)	762,646	773,280	823,271	823,271	823,271	823,271	823,271
Bureau Operating Costs	2,110,431	2,237,684	1,044,421	1,044,421	1,044,421	1,044,421	1,044,421
Debt Service	35,788	40,208	43,601	52,321	62,785	75,343	90,411
Solid Waste Cash Transfer	227,167	148,316	155,783	213,313	225,426	232,994	241,993
Unappropriated Fund Balance	3,254,528	1,568,358	1,422,803	1,066,212	978,430	795,431	526,122
<b>Total Bureau Budget</b>	<b>24,364,522</b>	<b>31,673,472</b>	<b>22,926,457</b>	<b>16,170,312</b>	<b>16,257,640</b>	<b>16,247,326</b>	<b>16,145,703</b>



## **RISKS TO THE FIVE-YEAR FORECAST**

Risks to the Bureau of Planning and Sustainability's five-year plan forecast include:

### **REVENUES**

- Reduced General Fund ongoing resources available Citywide and allocated to BPS
- Reduced General Fund one-time resources available Citywide and allocated to BPS
- Reduced federal grant support.

### **EXPENDITURES**

- New, unanticipated and unbudgeted projects may emerge as priorities from the community or from Council and require existing staff resources to be redeployed from their original assignments.
- Other bureaus' participation (secured by interagency or intergovernmental agreements) may take more time and/or more resources. This threatens the ability of the bureau to complete projects on time and on budget. Other bureaus and agencies may reduce their involvement on a Planning project which could impact the quality and effectiveness of the work and slow progress.

Bureau of Planning and Sustainability  
Solid Waste Management Fund  
FY 2011-12 Five-Year Financial Plan

## **Introduction**

The Solid Waste Management Fund currently supports the efforts of the Bureau of Planning and Sustainability (BPS) Solid Waste and Recycling, Green Building, and Sustainability at Work programs; the Bureau of Development Services Residential Nuisance Abatement program; and the Public Trash Can program.

**The Solid Waste and Recycling program** develops policy and oversees the collection of solid waste, recyclables and compostable materials from residential and commercial sources within the Portland Urban Services Boundary. Residential program responsibilities include franchising of residential collection companies, enforcing service standards, setting rates, educating customers and promoting programs. The Commercial program provides recycling technical assistance to multifamily property managers and local businesses, issues permits and enforces service standards and compliance with the City's mandatory commercial recycling requirement. Commercial service is not franchised or rate regulated in Portland.

**The Green Building program** promotes the design and development of healthy, resource efficient buildings and districts with a focus on such areas as recycled building materials, energy and water conservation, construction site recycling, stormwater management and indoor air quality. Services include training, education, and technical assistance for businesses, homeowners, developers, contractors and City government projects.

**Sustainability at Work** provides Portland's businesses with links to the technical and financial assistance needed to green their operations through a partnership with City and regional resource conservation organizations. Many business owners or staff don't know where to start or are overwhelmed by the prospect of becoming green. **Sustainability at Work** assists businesses by providing free sustainability evaluations and customized recommendations in the areas of energy, water, transportation, green building, operations, waste reduction and recycling. **Sustainability at Work** also helps businesses find technical assistance, expert advice, loans and cash incentives to get them started.

**The Nuisance Abatement program** provides nuisance abatement and cleanup services by the Bureau of Development Services to residential properties with accumulations of garbage.

**The Public Trash Can program** provides trash receptacles and contracts collection service for 617 trash cans in downtown and six other business areas of the city. A public recycling component provides recycling receptacles for the

public to place recyclable cans, bottles and paper in conjunction with high-volume downtown trash cans.

## Revenue Sources

Revenue sources for the Solid Waste Management Fund include residential franchise fees, commercial tonnage and permit fees, grants, and intergovernmental revenues.

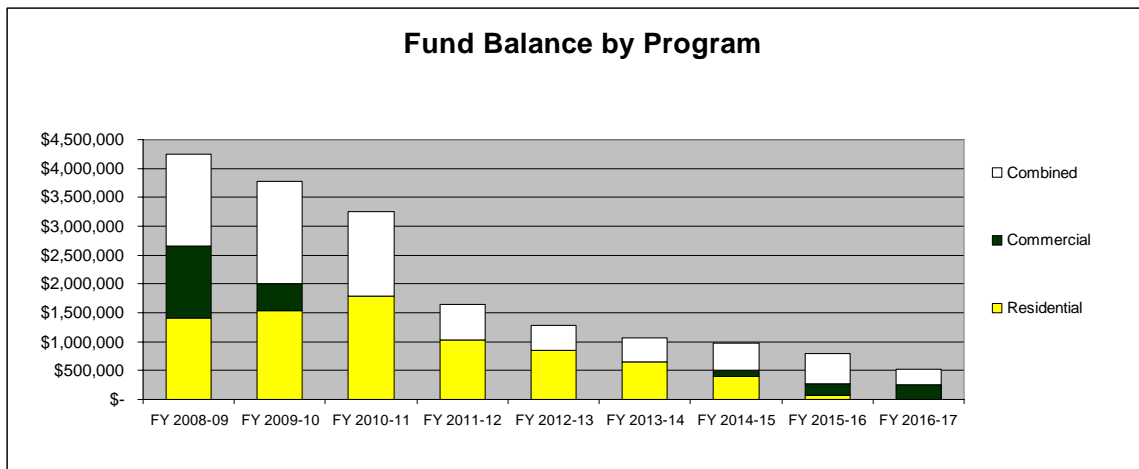
- Residential franchise fees are set at five percent of total revenues.
- Commercial tonnage fees are set at \$6.80/ton for garbage disposal.

## Fund Balance

The minimum fund balance level is set at \$500,000 to provide an operating reserve and contingency in the case of an emergency. The current fund balance is separated into residential, commercial and combined sources. Combined sources are from grants and miscellaneous revenues that replaced City funds and could be applied to either residential or commercial programs.

The fund balance on July 1, 2011 was \$3,254,528 and comprised of:

- \$1,792,493 from the Residential program.
- \$1,462,035 from combined sources.



BPS projects a fund balance of approximately \$526,000 in FY 2016-17.

## **Issues Affecting the Financial Plan**

The following issues will have an impact on the Five Year Financial Plan including:

- Portland Recycles! Plan
- Containers in the Right of Way
- Nuisance Abatement
- Public Trash Cans and Recycling Containers
- Residential Rates
- Green Building
- Sustainability at Work

### **Portland Recycles! Plan**

Portland City Council adopted the Portland Recycles! Plan in 2007 and 2008. The plan calls for residents and businesses to achieve a 75 percent recycling rate by 2015. Expanded recycling services will be provided to over 145,000 households and 20,000 businesses in Portland as part of extensive effort to reach the new goals.

The first phase of the Portland Recycles! Plan residential section included adding new recyclables (plastic tubs, buckets and nursery pots) and delivering recycling and yard debris roll carts to households in 2008. Following a year-long pilot program, in October 2011 haulers began allowing food scraps to be placed in the green compost cart and increasing its collection frequency from every-other-week to weekly. At the same time, garbage collection shifted to every other week. Evaluation of the new program will be shared with PURB over the course of the next year to inform any refinements to the program.

The commercial section of the Portland Recycles! Plan includes greater staff contact with businesses to increase participation in paper recycling, construction and demolition recovery, and food composting programs. Funds are also allocated for commercial recycling and food composting roll cart costs to assure necessary containers are available to businesses in the Recycle at Work and Portland Composts programs.

### **Containers in the Right of Way**

In 2008 Portland City Council adopted City Code amendments to address nuisance and public access issues caused by containers in the right of way. BPS notifies businesses that storage of garbage or recycling containers in the right of way is against the law and works with those businesses to find alternative locations.

### **Nuisance Abatement**

The FY 2011-12 Adopted Budget included an interagency agreement with the Bureau of Development Services (BDS) for nuisance abatement activities related to garbage

accumulation on private property. The FY 2012-13 Requested Budget includes increasing the interagency agreement with BDS to meet an increase in nuisance calls.

### **Public Trash Cans and Recycling Containers**

BPS contracts for collection of garbage from public trash cans located downtown and six other business districts is provided by commercial haulers selected through a bidding process. The annual cost to BPS for these services is approximately \$263,000.

Establishing a public recycling program was part of the Portland Recycles Plan adopted by City Council in 2008. Public recycling containers were installed along the downtown transit mall in spring 2011 to provide a convenient alternative for recycling in public settings and boosting overall public awareness of recycling.

### **Residential Rates**

Every year BPS reviews and revises rates to reflect the current costs of providing residential garbage, recycling, and yard debris collection. Analysis includes independent CPA review of hauler financial records, monitoring of the average weights of garbage in each can size and forecasting the market value of recyclables. Rates are developed using cost-of-service rate-making principles, with solid waste and recycling haulers projected to earn a 9.5% operating margin and the City receiving a 5.0% franchise fee. Prior to submittal to City Council, the Portland Utilities Review Board reviews the proposed rates.

City Council approved two rate changes in the past year. The first was a rate increase effective July 1, 2011 that was due to several factors, including: 1) increased hauler truck costs prompted by the City's clean fleet truck replacement policies that reduce diesel emissions, 2) an increase in the solid waste tip fee at Metro transfer stations, and 3) higher yard debris disposal costs.

The second rate change took effect October 31, 2011, in conjunction with the switch to weekly green cart collection and every-other-week garbage collection. Portland households in single-family through fourplex units were able to place all food scraps (including meat, dairy, grains and bones), along with yard debris, in their green cart. The rate for the most common service level, the 32-gallon garbage can, remained \$27.00 per month, while the cost for larger garbage cans increased.

### **Green Building**

The Green Building Program provides technical assistance on comprehensive sustainable building practices and district-scale conservation strategies, including a strong emphasis on waste prevention and reduction, job site recycling, recycling facilities in buildings, reuse of salvage materials, and recycled-content building products. The Green Investment Fund (GIF), which received funding from the Solid Waste Management Fund, has concluded its award phase. GIF has proven very successful in supporting innovative projects that conserve resources and maximize waste prevention. However, increasing

concerns about the impact of buildings on climate change have led the City to focus its green building initiatives on policy needs.

### **Sustainability at Work**

BPS has formed a partnership of public and private service providers that have a direct interest in working with the small business sector to achieve specific resource conservation goals. The center offers small businesses a menu of resource conservation services and incentives that are locally available in a simple, one-stop shop format. BPS houses the program and serves as the coordinating body for the partners including BPS internal programs, Metro, Portland Water Bureau, Portland Development Commission, Pacific Power, PGE and other partners.

### **Risks to the Forecast**

Several factors create risks to the Solid Waste Management Fund Five-Year Plan forecast. Due to the recent economic downturn, businesses are generating less solid waste, thereby reducing revenues collected by BPS via the commercial tonnage fee. On the residential side, the new composting collection program is not projected to decrease franchise fee revenues; however, this substantial program change provides some uncertainty to revenue forecasts. BPS also relies on Metro local cost sharing funds that have been provided to local governments in the region that are being reduced in FY 2012-13. The Portland share of waste reduction funding will be cut \$190,000. These factors combine to create some uncertainty to the forecast provided in this report.

### **Forecast Assumptions**

#### **Assumptions in current plan**

##### Resources

- The commercial tonnage fee is currently \$6.80/ton of solid waste disposed by commercial permittees. In order to generate necessary revenues in the future, the fee is proposed to increase by \$1.50 per ton from \$6.80 to \$8.30 in FY 2012-13.
- The plan includes \$552,000 per year from Metro to fund staff and program expenses for waste reduction and recycling projects.
- The Master Recycler Program will be funded through FY 2015-16 by other local governments and BPS.

**Bureau of Planning and Sustainability  
Solid Waste Management Fund  
FY 2011-12 Five Year Financial Plan**

**Economic and Other Assumptions**

	<b>Current</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
	FY 2011-12	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	FY 2016-17
Interest Earnings	0.45%	0.35%	0.50%	0.50%	0.50%	0.50%
Personal Services		4.30%	3.40%	3.70%	3.80%	3.30%
External Materials & Services		3.50%	3.40%	2.80%	2.60%	2.80%
Internal Materials & Services		3.50%	3.40%	2.80%	2.60%	2.80%
General Fund & Other Overhead		3.40%	2.60%	2.90%	2.60%	2.80%

**NOTES**

- Economic and inflationary assumptions are provided by the Office of Management and Finance.

**Rate History and Forecast  
Weekly 32 Gallon Can Service (1)**

**HISTORY**

FY 1993-94	FY 1994-95	FY 1995-96	FY 1996-97	FY 1997-98	FY 1998-99
\$ 17.60	\$ 17.60	\$ 17.20	\$ 17.50	\$ 17.50	\$17.20
FY 1999-00	FY 2000-01	FY 2001-02	FY 2002-03	FY 2003-04	FY 2004-05
\$17.60	\$17.85	\$18.25	\$18.75	\$18.75	\$18.55
FY 2005-06	FY 2006-07	FY 2007-08	FY 2008-09	FY 2009-10	FY 2010-11
\$19.65	\$20.60	\$20.85	\$24.45	\$25.30	\$26.40

**FORECAST**

<b>Current</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
2011-12	2012-13	2013-14	2014-15	2014-15	2015-16
\$ 27.00	\$ 27.50	\$ 28.05	\$ 28.65	\$ 29.20	\$ 29.80
\$27.00	\$27.54	\$28.09	\$28.65	\$29.23	\$29.81

**NOTES**

- This is the most common level of service City-wide, with a 50% subscription rate.
- Prior to 11-12, rates included weekly garbage and recycling collection bi-weekly yard debris collection. Beginning October 31, 2011, rates included weekly recycling and yard debris collection and bi-weekly garbage collection.
- Rates inflated 2.0% annually for planning purposes; franchise fee set at 5.0%.

**Fiscal Year**

	<b>Current</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	
	<b>Actual</b>	<b>Projected</b>	<b>Forecast</b>	<b>Forecast</b>	<b>Forecast</b>	
	<b>2010-2011</b>	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	
					<b>2015-16</b>	
Total Commercial Tonnage	230,999	236,051	237,964	239,966	243,673	248,272
Commercial Permit Fee \$/Ton	\$6.80	\$6.80	\$8.30	\$8.30	\$9.30	\$9.30
Commercial Permit Fee Revenue	\$1,570,793	\$1,605,148	\$1,975,099	\$1,991,717	\$2,266,163	\$2,308,929

**BUREAU OF PLANNING AND SUSTAINABILITY**  
**Solid Waste Management Fund**  
**FY 2011-12 Five Year Financial Plan**  
**Historical & Forecast Sources and Uses of Funds**

<b>Resources</b>	<b>Actual 2009-10</b>	<b>Actual 2010-11</b>	<b>Estimated Year-End 2011-12</b>	<b>Year 1 Requested 2012-13</b>	<b>Year 2 Projected 2013-14</b>	<b>Year 3 Projected 2014-15</b>	<b>Year 4 Projected 2015-16</b>	<b>Year 5 Projected 2016-17</b>
<b>Residential Program Revenue</b>								
Residential Franchise Fee (1)	2,330,747	2,494,154	2,578,199	2,536,221	2,569,364	2,603,933	2,638,635	2,673,832
Restricted Residential Grants	70,931	190,326	78,392	73,000	73,000	73,000	73,000	73,000
<b>Total Residential Revenue</b>	<b>2,401,678</b>	<b>2,684,480</b>	<b>2,656,591</b>	<b>2,609,221</b>	<b>2,642,364</b>	<b>2,676,933</b>	<b>2,711,635</b>	<b>2,746,832</b>
<b>Commercial &amp; Multifamily Program Revenue</b>								
Commercial Permit Fee	1,504,536	1,570,793	1,605,148	1,975,099	1,991,717	2,266,163	2,308,929	2,355,108
Commercial Permit Application	350	17,150	17,500	17,500	17,500	17,500	17,500	17,500
Restricted Commercial/Multifamily Grants	458,034	636,689	513,217	286,000	286,000	286,000	286,000	286,000
<b>Total Commercial/MF Revenue</b>	<b>1,962,920</b>	<b>2,224,632</b>	<b>2,135,865</b>	<b>2,278,599</b>	<b>2,295,217</b>	<b>2,569,663</b>	<b>2,612,429</b>	<b>2,658,608</b>
<b>Internal Revenues</b>								
BEST Ct, BEST Awards, GB, GIF	29,181	21,027	116,082	15,000	15,000	15,000	15,000	15,000
Outranch-OSD IA	95,209	0	0	0	0	0	0	0
<b>Total Other Restricted Revenues</b>	<b>124,390</b>	<b>21,027</b>	<b>116,082</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>
<b>Unrestricted Revenues</b>								
Interest Income	50,081	20,623	12,923	5,426	5,752	4,869	4,279	6,052
Unrestricted Grants	263,834	263,000	263,000	266,000	266,000	266,000	266,000	266,000
Fines and Penalties	1,200	1,400	1,190	2,500	2,500	2,500	2,500	2,500
Other Revenues	33,402	66,761	36,310	35,000	35,000	35,000	35,000	35,000
<b>Total Unrestricted Revenues</b>	<b>348,517</b>	<b>351,783</b>	<b>313,423</b>	<b>308,926</b>	<b>309,252</b>	<b>308,369</b>	<b>307,779</b>	<b>309,552</b>
<b>Total Fund Revenue</b>	<b>4,837,505</b>	<b>5,281,923</b>	<b>5,221,961</b>	<b>5,211,746</b>	<b>5,261,834</b>	<b>5,569,965</b>	<b>5,646,843</b>	<b>5,729,991</b>
Beginning Fund Balance/Contingency	4,247,421	3,769,937	3,254,528	1,646,642	1,287,899	1,066,212	978,430	795,431
<b>TOTAL RESOURCES</b>	<b>9,084,926</b>	<b>9,051,861</b>	<b>8,476,489</b>	<b>6,858,388</b>	<b>6,549,733</b>	<b>6,636,177</b>	<b>6,625,274</b>	<b>6,525,422</b>

**BUREAU OF PLANNING AND SUSTAINABILITY**  
**Solid Waste Management Fund**  
**FY 2011-12 Five Year Financial Plan**  
**Historical & Forecast Sources and Uses of Funds**

<b>Expenses</b>	<b>Actual 2009-10</b>	<b>Actual 2010-11</b>	<b>Estimated Year-End 2011-12</b>	<b>Year 1 Requested 2012-13</b>	<b>Year 2 Projected 2013-14</b>	<b>Year 3 Projected 2014-15</b>	<b>Year 4 Projected 2015-16</b>	<b>Year 5 Projected 2016-17</b>
<b>Personnel Services</b>	<b>2,155,492</b>	<b>2,267,226</b>	<b>2,872,468</b>	<b>2,685,289</b>	<b>2,587,589</b>	<b>2,683,330</b>	<b>2,785,296</b>	<b>2,877,211</b>
<b>Materials and Services</b>								
External Materials and Services	1,248,788	1,966,937	2,275,334	1,002,272	959,126	977,736	995,500	1,015,128
Internal Materials and Services	977,747	357,929	456,327	461,187	474,045	484,995	495,446	506,995
<b>Total Material and Services</b>	<b>2,226,535</b>	<b>2,324,866</b>	<b>2,731,661</b>	<b>1,463,459</b>	<b>1,433,172</b>	<b>1,462,730</b>	<b>1,490,946</b>	<b>1,522,123</b>
<b>Transfers:</b>								
General Fund Overhead	142,364	137,006	140,245	147,175	151,002	155,381	159,420	163,884
Campaign Financing	0	0	0	0	0	0	0	0
Pension Debt Redemption Fund	33,191	35,788	40,208	52,209	62,311	70,045	73,574	78,109
General Fund Business License Fee	90,945	0	0	0	0	0	0	0
Green Initiative (3)	666,461	0	0	0	0	0	0	0
bureau operations		942,286	1,037,194	1,147,169	1,176,995	1,211,128	1,242,618	1,277,411
cash transfer IA		90,161	8,071	0	0	0	0	0
Other -COLA set aside	0	0	0	75,188	72,452	75,133	77,988	80,562
<b>Total Transfers</b>	<b>932,961</b>	<b>1,205,241</b>	<b>1,225,718</b>	<b>1,421,741</b>	<b>1,462,760</b>	<b>1,511,687</b>	<b>1,553,600</b>	<b>1,599,966</b>
<b>Total Expenses</b>	<b>5,314,988</b>	<b>5,797,332</b>	<b>6,829,847</b>	<b>5,570,489</b>	<b>5,483,521</b>	<b>5,657,747</b>	<b>5,829,843</b>	<b>5,999,300</b>
Ending Fund Balance/Contingency	3,769,937	3,254,528	1,646,642	1,287,899	1,066,212	978,430	795,431	526,122
<b>TOTAL REQUIREMENTS</b>	<b>9,084,926</b>	<b>9,051,861</b>	<b>8,476,489</b>	<b>6,858,388</b>	<b>6,549,733</b>	<b>6,636,177</b>	<b>6,625,274</b>	<b>6,525,422</b>



**BUREAU OF PLANNING AND SUSTAINABILITY**  
**Solid Waste Management Fund**  
**FY 2011-12 Five Year Financial Plan**  
**Historical & Forecast Fund Balances By Program**

	Actual FY 2009-10	Actual FY 2010-11	Estimated Year-End FY 2011-12	Year 1 Requested FY 2012-13	Year 2 Projected FY 2013-14	Year 3 Projected FY 2014-15	Year 4 Projected FY 2015-16	Year 5 Projected FY 2016-17
<b>RESOURCES</b>								
<b>Residential Program Revenue</b>								
Residential Franchise Fee	2,330,747	2,494,154	2,578,199	2,536,221	2,569,364	2,603,933	2,638,635	2,673,832
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<b>Commercial &amp; Multifamily Program Revenue</b>								
Commercial Permit Fee (1)	1,504,536	1,570,793	1,605,148	1,975,099	1,991,717	2,266,163	2,308,929	2,355,108
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<b>Internal Revenues</b>								
BEST Ct, BEST Awards, GB, GIF	29,181	21,027	116,082	15,000	15,000	15,000	15,000	15,000
Outreach-BPS IA	95,209	0	0	0	0	0	0	0
<b>Total Internal Revenues</b>	<b>124,390</b>	<b>21,027</b>	<b>116,082</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>
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Unrestricted Grants	263,834	263,000	263,000	266,000	266,000	266,000	266,000	266,000
Fines and Penalties	1,200	1,400	1,190	2,500	2,500	2,500	2,500	2,500
Other Revenues	33,402	66,761	36,310	35,000	35,000	35,000	35,000	35,000
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<b>Total Fund Revenue</b>	<b>4,837,505</b>	<b>5,281,923</b>	<b>5,221,961</b>	<b>5,211,746</b>	<b>5,261,834</b>	<b>5,569,965</b>	<b>5,646,843</b>	<b>5,729,991</b>
<b>Beginning Fund Balance/Contingency</b>	<b>4,247,421</b>	<b>3,769,937</b>	<b>3,254,528</b>	<b>1,646,642</b>	<b>1,287,899</b>	<b>1,066,212</b>	<b>978,430</b>	<b>795,431</b>
<b>TOTAL RESOURCES</b>	<b>9,084,926</b>	<b>9,051,861</b>	<b>8,476,489</b>	<b>6,858,388</b>	<b>6,549,733</b>	<b>6,636,177</b>	<b>6,625,274</b>	<b>6,525,422</b>
<b>EXPENDITURES</b>								
Residential Programs	1,684,065	1,815,418	2,823,484	2,171,345	2,202,421	2,283,227	2,364,805	2,445,113
General Fund (Licenses)	90,945	0	0	0	0	0	0	0
Green Building Program	666,461	723,188	749,242	736,229	746,503	757,219	767,977	778,888
Multifamily and Commercial Programs	2,697,963	2,995,772	3,068,598	2,388,343	2,248,832	2,316,742	2,386,079	2,452,744
General Fund Overhead	142,364	137,006	140,245	147,175	151,002	155,381	159,420	163,884
Cash Transfer IA	0	90,161	8,071	0	0	0	0	0
Pension Debt Retirement Fund	33,191	35,788	40,208	52,209	62,311	70,045	73,574	78,109
Contingency-COLA set aside	0	0	0	75,188	72,452	75,133	77,988	80,562
<b>TOTAL EXPENDITURES</b>	<b>5,314,988</b>	<b>5,797,332</b>	<b>6,829,847</b>	<b>5,570,489</b>	<b>5,483,521</b>	<b>5,657,747</b>	<b>5,829,843</b>	<b>5,999,300</b>
Fund Balance Attributed to Residential	\$ 1,530,695	\$ 1,792,493	\$ 1,036,124	\$ 849,309	\$ 652,495	\$ 394,088	\$ 75,166	\$ -
Fund Balance Attributed to Commercial & M/F	471,627	0	0	0	0	116,235	197,611	250,071
Fund Balance Attributed to Both	1,767,616	1,462,035	610,518	438,590	413,717	468,107	522,654	276,051
<b>Total Ending Balance</b>	<b>\$ 3,769,937</b>	<b>\$ 3,254,528</b>	<b>\$ 1,646,642</b>	<b>\$ 1,287,899</b>	<b>\$ 1,066,212</b>	<b>\$ 978,430</b>	<b>\$ 795,431</b>	<b>\$ 526,122</b>



**Bureau of Planning and Sustainability**

Innovation. Collaboration. Practical Solutions.

**To: Portland City Council**  
Mayor Sam Adams  
Commissioner Nick Fish  
Commissioner Amanda Fritz  
Commissioner Randy Leonard  
Commissioner Dan Saltzman

**From: Budget Advisory Committee for the Bureau of Planning and Sustainability**

Janis Adler	Annette Mattson
Kathy Gillette	Linda Nettekoven
Peter Gutmann	David Posada
Loren Lutzenhiser	Nicholas Starin
Elle McKay	Simon Tomkinson

**Date: January 30, 2012**

**RE: Recommendations for BPS FY 2012-13 Requested Budget**

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This year's BPS BAC was comprised of many of the same community members as our previous year's committee. While the understanding is that all bureaus will be taking budget cuts this year, members continued to be enthusiastic and engaged in working with BPS on the FY12-13 budget request.

**Recommendations for Improving the BAC Role**

BAC members support the intent of the program ranking process but found the resulting rankings themselves are of limited value. The simple ranking of one program against another without regard to statutory mandates, source of revenue (in some cases restricted, in other cases discretionary) or size of program does not provide the bureau with special insight into its difficult budget decisions. In addition, many of the most consequential budget decisions take place not in shifting resources from one program to another but in changing the substance and strategy within a program. Finally, a simple ranking does not allow for nuances such as distinguishing between urgency and importance, or long-term versus short-term value. The City needs to deliver on all these fronts, but being forced simply to rank, rather than to advise and guide, greatly oversimplifies the important work of budgeting.

To address these challenges, we recommend the following:

- 1) The BAC should evaluate programs within funding sources. For BPS specifically, for example, programs funded primarily by General Fund should be weighed against other General Fund-supported programs; those with Solid Waste Management Fund support should be ranked against other SWMF programs; and programs that are exclusively funded with grants should be evaluated on their own merits.



City of Portland, Oregon | Bureau of Planning and Sustainability

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- 2) The BAC should provide guidance to the bureaus as to the most effective elements of programs to help inform bureau workplans, rather than simply ranking programs.
- 3) If the ranking process is retained, BPS should divide its budget description categories into substantially smaller programs to allow a more granular ranking.
- 4) Bureau work plan items should be ranked on additional criteria such as estimated impact and return on investment or effort.

If the instructions to the bureau BACs are revised in the future, we would welcome the opportunity to discuss how to continue to improve the process.

### Results of the Program Ranking Process

At the start of the BAC process, BPS staff provided a general orientation to the bureau’s work, shared BPS’ mission statement and strategic plan, and briefed the BAC on BPS’ current and proposed programs. In addition to programmatic information from BPS staff, BAC members also received data from the Auditor’s annual Service Efforts and Accomplishments survey, BPS program performance measures, and recent Portland Plan surveys.

After discussions about BPS programs and funding sources, BAC members developed program rankings according to the two specified criteria: 1) core to the bureau’s mission and 2) community priority. The results of the ranking exercise are shown in Table 1.

**Table 1: Program Ranking**

Program	Community Priority	Core to Bureau Mission
Portland Plan/Comprehensive Plan	1	1
District Planning and Area Projects	2	2
Central City and Urban Design	5	3
Solid Waste Policy and Operations	3	6
River and Watershed Planning	4	7
Policy Analysis and Research	9	3
General Planning/Code Development	10	5
Clean Energy	7	9
Energy and Climate Policy	8	8
Residential Sustainability Outreach	6	13
Business Sustainability Outreach	10	10
Sustainable Food	10	11
Green Building and Development	14	12
Youth Planning	13	15
Government Sustainability	15	14

*Note: The programs are listed in order of the average of the two rankings, with community priority serving as a tie breaker.*

### *Comments on the Rankings*

BAC members had several key observations that are not necessarily reflected in Table 1. Most notably, while Energy and Climate Policy ranked eighth, the BAC strongly believed this is a critical role for Portland and BPS in particular, and the middling ranking reflects the difficulty in comparing issues that are *urgent* with those that are *important*. While national and international efforts to address climate change are struggling, leadership is increasingly shifting to cities, and Portland has a wealth of experience and accomplishments that provide benefit to our own businesses and residents while serving as an example for cities around the world. The modest

resources BPS dedicates to climate policy produce an outside return on investment, and one that delivers benefits now and for decades to come. More than ever, Portland should elevate its leadership in addressing climate change.

As was the case last year, the BAC viewed the Youth Planning and Government Sustainability programs as essential to the work of the City but not the sole or even primary responsibility of BPS. The BAC would like to see each City bureau share in the responsibility for engaging youth and have bureau-specific sustainability-oriented goals that are part of the budget process. The BAC also believed that Youth Planning deserved continued funding and should be carried out in partnership with the Multnomah Youth Commission and the Cradle-to-Career initiative.

It is noteworthy that General Planning/Code Development and Policy Analysis and Research were ranked relatively low as community priorities compared to their importance to bureau mission, while residential sustainability outreach was ranked relatively high in importance to the community but low in relation to its importance to bureau mission. BPS will need to continue to be responsive to community priorities while ensuring that low-visibility but essential building blocks like policy analysis and research receive adequate resources.

### **BPS Decision Packages**

In addition to the overall program rankings, BAC members reviewed and discussed the bureau's proposed decision packages. The BAC found BPS' proposed General Fund cut packages to be painful and with real consequences to the bureau's ability to complete its work in a timely fashion.

For example, at the 4% and 6% cut packages the resulting delay and reduction in scope of the Central City Plan has negative impacts on development in central Portland, a major economic driver for the region. Completing the Central City Plan on its current schedule provides certainty to the development community, improving the likelihood of major projects moving forward. The 8% cut is still more concerning, as it would affect the Central City Plan as well as result in downscaling of the Comprehensive Plan, a once-in-a-generation opportunity to shape the growth of Portland and bring much needed equity in planning and development to the city.

Given the challenging budget outlook for the City as a whole, however, the 4% and 6% cuts BPS has identified seem to be a prudent effort to minimize the damage. These cuts are only tolerable, however, if BPS receives all of its requests for one-time General Fund support. The one-time requests are essential for completing the Comprehensive Plan, which is both required by the State and represents a once-in-a-generation opportunity to shape the growth of Portland.