

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

## MEMO

October 1, 2012

To: Financial Planning Division, Office of Management and Finance  
Commissioner Fritz  
Commissioner Fish  
Commissioner Leonard  
Commissioner Saltzman  
City Auditor Griffin-Valade

From: Mayor Adams

Subject: **Fall BuMP – Bureau of Planning and Sustainability**

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With this cover memo I am conveying materials that comprise the FY 2012-13 Fall BuMP submittal for the Bureau of Planning and Sustainability and the Solid Waste Management Fund.

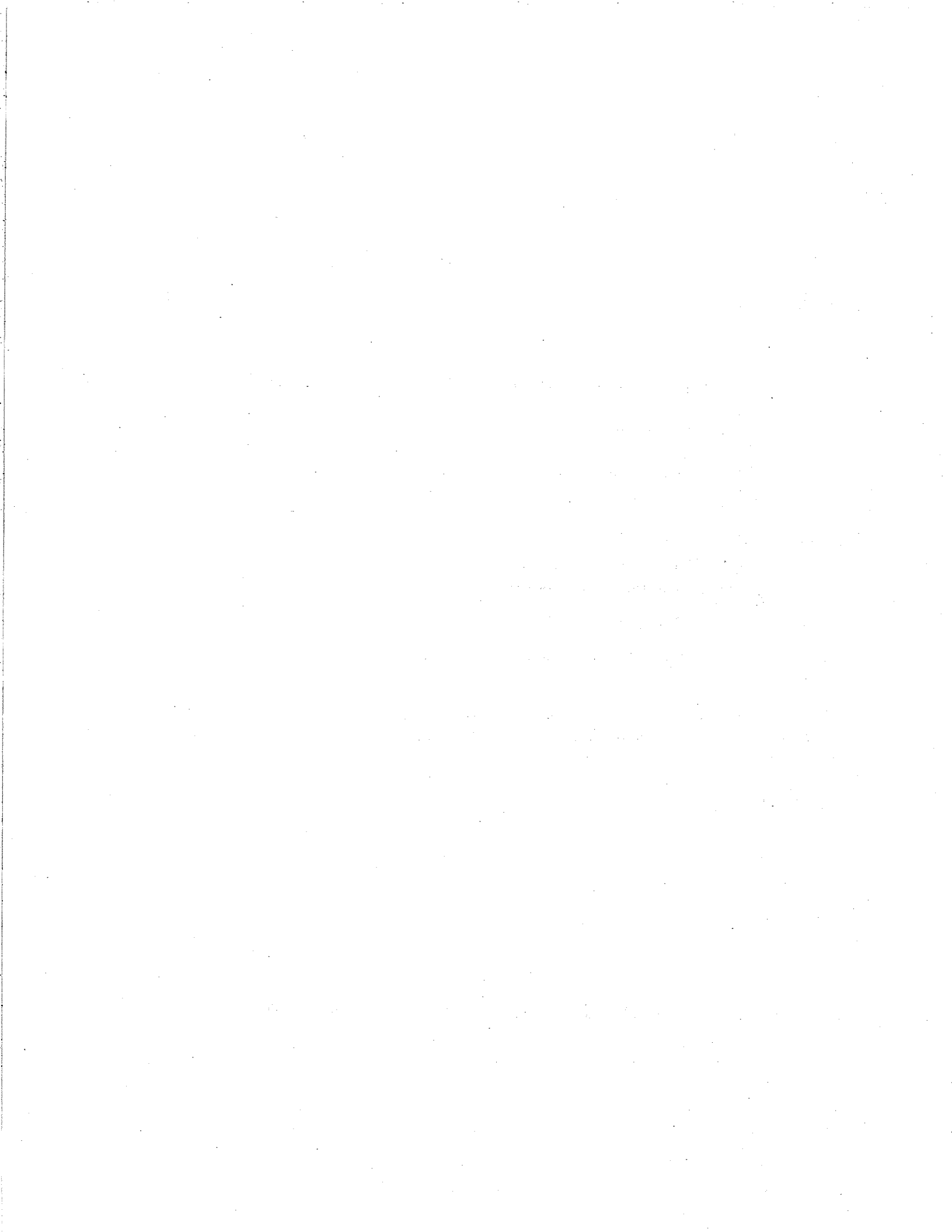
Thank you.

c. Susan Anderson, Director, Bureau of Planning and Sustainability



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## BUDGET AMENDMENT REQUEST

Bureau of Planning & Sustainability

PERIOD Fall BuMP

FISCAL YEAR FY 2012-13

### PN\_001 - Grants Carryover

True up various grants carryover ended by June 30, 2013.

Dollar Amount: \$1,979,130  
Type: Carryover Request  
Resources: Grants

### PN\_002 - Encumbrance Carryover

Request encumbrance carryover from GF discretionary resources to support contracts committed in 2011-12 and continued in 2012-13.

Dollar Amount: \$459,093  
Type: Encumbrance Carryover Request  
Resources: General Fund Discretionary

### PN\_003 - Solid Waste Program Carryover

Request Solid Waste program carryover to support various solid waste outreach efforts; \$20,000 to launch a recognition campaign for Sustainability at Work certified businesses and \$160,000 to focus education and outreach efforts around the Be Cart Smart program.

Dollar Amount: \$180,000  
Type: Carryover Request  
Resources: Bureau Contingency

### PN\_004 - IA support from various bureaus

Request budget appropriations for various interagency agreements to support services provided by BPS, \$1500 from BHC for Fix-It Fair, \$2,000 from Water for Sustainability @ Work, \$10,000 from BHC for mapping services, and \$30,000 from BDS for Historic Resources.

Dollar Amount: \$43,500  
Type: New Request  
Resources: New Revenues

### PN\_005 - Event Sponsorship & Recycling Rebates Carryover.

Request carryover from Fix-It Fair sponsorship (\$10,500), BEST ticket sales (\$5,090), and recycling rebates (\$67,749) to fund event and recycling related expenses in 2012-13.

Dollar Amount: \$83,339  
Type: Carryover Request  
Resources: Bureau Contingency

## BUDGET AMENDMENT REQUEST

Bureau of Planning & Sustainability

PERIOD Fall BuMP

FISCAL YEAR FY 2012-13

### PN\_006 - IA services provided by city bureaus

Increase interagency agreements for services provided by city bureaus, \$315 with ONI to support neighborhood cleanup effort in North Portland Neighborhood and \$40,245 for inspections and nuisance abatement services provided by BDS.

Dollar Amount: \$40,560  
Type: Technical Adjustment  
Resources: Bureau Contingency

### PN\_007 - IGA carryover

Request remaining IGA's to continue Central City and Sustainable Food projects funded by PDC (\$120,000) and Global Philanthropy Partnership respectively (\$18,400).

Dollar Amount: \$138,400  
Type: Carryover Request  
Resources: New Revenues

### PN\_008 - Recode budget appropriations between programs

Recode appropriations between Administration and Fiscal teams.

Dollar Amount: \$0  
Type: Technical Adjustment  
Resources: Internal Transfer

### PN\_009 - Comp Plan

Contract funds have been reprogrammed to support staffing needs of Comprehensive Plan update and to provide a pro-rated share of funding for new BPS equity coordinator position. The breadth and aggressive schedule for the Comprehensive Plan project warrants additional staff work. Specifically contract funds funded will be used to support 0.60 FT Assoc. Planner position working on community outreach related to Comprehensive Plan and for a 6 month ½ time Supervising Transportation Planner position to assist with SW Barbur plan, State highway planning issues related to the Comprehensive Plan and the conclusion of work on West Hayden Island.

Dollar Amount: \$0  
Type: Technical Adjustment  
Resources: Internal Transfer

## BUDGET AMENDMENT REQUEST

Bureau of Planning & Sustainability

PERIOD Fall BuMP

FISCAL YEAR FY 2012-13

### PN\_010 - Public Recycling Container Installation

BPS is requesting the carryover of \$372,000 from unspent 2011-12 Solid Waste Management Fund to cover solid waste expenses that were originated in 11-12 but not billed until 12-13, as well as purchasing and installing public recycling container and purchasing recycling and composting roll carts for businesses.

Dollar Amount: \$372,000

Type: Carryover Request

Resources: Bureau Contingency

## Prior Year Business Area Reconciliation Report

	FY 2011-12 Revised Budget	FY 2011-12 Year-End Actuals	Percent of Actuals to Revised
<b>Bureau of Planning &amp; Sustainability</b>			
<b>EXPENDITURES</b>			
Personnel Services	\$7,238,644	\$7,127,526	98%
External Materials and Services	\$1,874,799	\$1,297,821	69%
Internal Materials and Services	\$1,124,265	\$1,283,871	114%
<b>TOTAL EXPENDITURES</b>	<b>\$10,237,708</b>	<b>\$9,709,218</b>	<b>95%</b>
<b>REVENUES</b>			
Charges for Services	\$0	(\$380)	0%
Intergovernmental Revenues	\$946,283	\$785,084	83%
Interagency Revenue	\$123,539	\$94,574	77%
Miscellaneous	\$10,500	\$40,412	385%
General Fund Discretionary	\$8,600,721	\$0	0%
General Fund Overhead	\$556,665	\$0	0%
<b>TOTAL REVENUES</b>	<b>\$10,237,708</b>	<b>\$919,690</b>	<b>9%</b>

### Bureau Reconciliation Narrative

#### General Fund 100000

External M&S – BPS requests encumbrance carryover to cover expenses committed in FY 2011-12 and to be spent in FY 2012-13.

Internal M&S – BPS had higher than anticipated expenses in OMF Internal Services and IA's with BPOT and ONI with combined expenses of over \$55K than budgeted.

Intergovernmental Revenues – The remaining PDC intergovernmental agreement for the Central City project will be carried over into FY 2012-13 to fund staff and contracts committed in FY 2011-12. The Fall BuMP includes additional \$120K for the carryover.

Interagency Revenue - BPS had IA's with Water, BES, and PBOT which BPS billed as services requested and performed.

Misc. – BPS collected over \$40,000 in sponsorship, fees, and IGA revenues to support Fix-It Fairs, Sustainability events, and a Healthy Kids IGA with OPHI.

#### Grants Fund 217000

Several multiyear grants were budgeted in FY11-12 with the ending dates before or by the end of June, 2013. Carryover amounts are intended to fund these programs through the end of grant periods.

## Prior Year Business Area Reconciliation Report

	FY 2011-12 Revised Budget	FY 2011-12 Year-End Actuals	Percent of Actuals to Revised
<b>Bureau of Planning &amp; Sustainability</b>			
<b>EXPENDITURES</b>			
Personnel Services	\$2,047,273	\$1,778,989	87%
External Materials and Services	\$14,879,839	\$12,660,090	85%
Internal Materials and Services	\$165,607	\$92,936	56%
<b>TOTAL EXPENDITURES</b>	<b>\$17,092,719</b>	<b>\$14,532,016</b>	<b>85%</b>
<b>REVENUES</b>			
Intergovernmental Revenues	\$17,092,719	\$14,398,896	84%
<b>TOTAL REVENUES</b>	<b>\$17,092,719</b>	<b>\$14,398,896</b>	<b>84%</b>

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## Prior Year Fund Reconciliation Report

	FY 2011-12 Revised Budget	FY 2011-12 Year-End Actuals	Percent of Actuals to Revised
<b>605 - Solid Waste Management Fund</b>			
<b>EXPENDITURES</b>			
Unappropriated Fund Balance	1,568,358	0	0.00
Personnel Services	2,147,587	2,064,102	96.11
External Materials and Services	2,247,315	1,429,991	63.63
Internal Materials and Services	1,506,394	1,484,274	98.53
Bond Expenses	40,208	38,676	96.19
Fund Transfers - Expense	148,316	148,316	100.00
<b>TOTAL EXPENDITURES</b>	<b>7,658,178</b>	<b>5,165,359</b>	<b>67.45</b>
<b>REVENUES</b>			
Budgeted Beginning Fund Balance	3,255,826	0	0.00
Licenses & Permits	2,595,699	2,572,010	99.09
Charges for Services	1,605,148	1,668,266	103.93
Intergovernmental Revenues	26,000	111,589	429.19
Interagency Revenue	15,000	9,305	62.03
Fund Transfers - Revenue	101,082	70,787	70.03
Miscellaneous	59,423	114,109	192.03
<b>TOTAL REVENUES</b>	<b>7,658,178</b>	<b>4,546,065</b>	<b>59.36</b>

### Fund Reconciliation Narrative

External M&S – BPS requests carryover to cover expenses committed in FY 2011-12 and to be spent in FY 2012-13.

Intergovernmental Revenues – About \$86K in indirect grant revenue were posted to this account which was not budgeted originally.

Misc. – BPS collected over \$114,000 in misc. revenue including interest on investments, rebates from haulers, and fees and sponsorship for BEST Business Center, BEST Awards, Build-It Green Tour of Homes, Urban Growth Bounty Sustainable Food classes, and other events. BPS requests carryover for sponsorship, fees, and recycling rebates collected to continue support 2012-13 events and expenses.



## **FY 2011-12 GF One-Time Decision Package**

### **Equity, Economic & Neighborhood Strategy**

**\$283,000**

These funds were used for Portland Plan-related contracts. The Portland Plan was reviewed and approved by the Planning and Sustainability Commission in spring 2012, and City Council approved the final Portland Plan on April 25, 2012.

### **Youth Planning**

**\$70,444**

This add package continued funding for an established program that was staffed with a program lead and two youth interns. All positions were filled as proposed. The program also included small grants to community initiatives for youth-related projects, which were all awarded in FY 11-12. The youth planning program supported preparation of the Portland Plan, which was approved by City Council in April 2012.

### **State-Mandated Comprehensive Plan Review**

**\$352,028**

This add package funded contracts related to the required background reports for the comprehensive plan update, which were completed and will be submitted to the State by the end of 2012. The main contract under this package was the Economic Opportunity Analysis with Eric Hovee and Associates. The background reports were approved by the Planning and Sustainability Commission and are scheduled for consideration by City Council in October 2012.

### **Time-Sensitive Planning Projects**

**\$172,784**

A draft rezoning proposal was completed for the 122nd rezoning project. This project was approved by the Planning and Sustainability Commission and is scheduled for a City Council hearing in October 2012.

FY 2011-12 BuMP Non-Technical Requests		Fall BuMP Update
BEST Awards	The funding for the BEST Awards Breakfast event was committed for 2011-12, but was not budgeted during annual budget process.	The full amount budgeted were spent in 2011-12 to support the BEST Awards Breakfast event.
Event sponsorship carryover	To request sponsorship carryover for BEST Awards Breakfast, sustainability classes, and recycling rebates received from haulers which will be distributed to various city bureaus.	These revenues continue to support BPS public events, including the BEST Awards and the Build It Green Tour of Homes. Recycling rebate funds are available to other bureaus to implement recycling and waste reduction projects.
Residential Food Scrap	City Council adopted rates that address new collection services, including the addition of curbside collection of food scraps, increasing yard debris pickup to weekly and reducing garbage pickup to every other week, effective October 31, 2011.	Residential food-scrap collection was implemented on schedule October 31, 2011, and BPS provided extensive public information via direct mail, home deliveries, and public messages to assist households with the transition. Temporary employees were hired and trained to staff a hotline for the first 10 weeks of the program, and those employees have now completed their assignments. An interim progress report on the program was shared at Council in May 2012.
Residential Waste Prevention Education	The Bureau of Planning and Sustainability is continuing a focused education and outreach effort around reusable bags. BPS plans to conduct a "Bring-Your-Bag" marketing and outreach campaign which would include TriMet bus ads and 15-second radio spots reminding Portlanders to bring their bag whenever they head out.	BPS conducted a public information campaign in October and November 2011 to help residents transition to reusable bags. This will continue to be a core part of BPS's engagement around waste reduction, but the concentrated outreach concluded in late 2011.
Contracts Carryover in GF	To request encumbrance carryover in General Fund.	For FY10/11, BPS requested approximately \$360,000 in encumbrance carryover to be used for contracts related to the West Hayden Island Annexation process, the Central City Plan project and Comprehensive Plan update. For the Comprehensive Plan, the funds were used to support outreach to East Portland school districts and development of 2035 growth scenarios. West Hayden Island work included completion of cost/benefit analyses, project facilitation and concept plan development. Central City work included continuation of urban design support for the NE Quadrant Plan.
Advance Recovery	Request additional appropriation from the General Fund to fund the net negative advances (\$118,221).	All outstanding advances were recovered and closed in FY 2011-12.

## Bureau of Planning & Sustainability

### Performance Measures

Performance Measure	Type	FY 2010-11	FY 2011-12	FY 2012-13	FY 2013-14	FY 2013-14
		Year-End Actuals	Year-End Actuals	Revised Budget	Performance No Dec Pkg	Performance With Dec Pkg
PN_0006 - Citywide Livability Rating	EFFECTIVE	80%	78%	80%	0%	0%
PN_0013 - Overall Rating - Planning for Future Land Use	EFFECTIVE	40%	40%	40%	0%	0%
PN_0014 - Percent of significant natural resources protected through non-regulatory and/or regulatory measures	EFFECTIVE	80%	80%	81%	0%	0%
PN_0015 - Percent of residents rating neighborhood livability "good" or "very good"	EFFECTIVE	87%	86%	85%	0%	0%
PN_0016 - Percent of residents rating access to shopping and other services "good" or "very good"	EFFECTIVE	76%	75%	74%	0%	0%
PN_0019 - Percent of residents rating the attractiveness of new residential development good or very good	EFFECTIVE	61%	62%	63%	0%	0%
PN_0020 - Percent of housing built in four-county region within City of Portland limits	EFFECTIVE	33%	28%	32%	0%	0%
SD_0001 - Percent of residential material diverted from wastestream	EFFECTIVE	51%	56%	57%	0%	0%
SD_0002 - Percent of commercial material diverted from wastestream	EFFECTIVE	69%	69%	73%	0%	0%
SD_0003 - Residents reached by sustainable training and outreach	WORKLOAD	71,290	138,448	90,000	0	0
SD_0007 - Grants and contracts awarded	WORKLOAD	\$6,209,678	\$16,135,834	\$7,950,000	\$0	\$0
SD_0008 - Percent reduction in local per capita CO2 emissions from 1990 levels	EFFICIENCY	26%	26%	27%	0%	0%
SD_0014 - Pounds of solid waste generated per household	WORKLOAD	1,248	1,134	1,225	0	0
SD_0015 - Tons of solid waste generated by businesses	WORKLOAD	238,902	197,210	200,000	0	0
SD_0016 - Typical residential garbage and recycling monthly bill, adjusted for inflation (2000 dollars)	EFFICIENCY	\$27.85	\$28.29	\$29.60	\$0.00	\$0.00
SD_0018 - Citizens' satisfaction with solid waste and recycling programs (percent rating "good" or "very good")	EFFECTIVE	78%	78%	80%	0%	0%
SD_0019 - Businesses reached by sustainability outreach and training	WORKLOAD	1,089	933	1,000	0	0
SD_0020 - Number of multifamily units provided with recycling assistance	WORKLOAD	20,626	15,600	18,500	0	0
SD_0023 - Number of development projects provided with green building assistance	WORKLOAD	16	11	20	0	0
SD_0024 - Number of design and construction industry professionals trained in green building practices	WORKLOAD	1,163	994	1,000	0	0
SD_0025 - Per capita residential energy use (million BTUs)	EFFECTIVE	28.10	28.60	27.00	0.00	0.00
SD_0026 - Number of certified green buildings in Portland	EFFECTIVE	1,700	2,378	2,500	0	0
SD_0027 - Utility savings to City from energy- and water-efficiency projects and waste and toxics reduction (million dollars)	EFFECTIVE	\$3.54	\$5.50	\$5.40	\$0.00	\$0.00
SD_0028 - Percent of City electricity use from renewable resources	EFFECTIVE	9.5%	15.0%	15.0%	0.0%	0.0%
SD_0031 - Bureaus assisted with sustainability projects	WORKLOAD	40	25	26	0	0
SD_0032 - City employees provided with sustainability training	WORKLOAD	50	138	155	0	0
SD_0036 - Citizens participating in workshops	WORKLOAD	2,135	1,598	2,200	0	0
SD_0037 - Cost per Fix-It Fair participant	EFFICIENCY	\$65.00	\$59.00	\$58.00	\$0.00	\$0.00
SD_0038 - Residents participating in urban agricultural projects	WORKLOAD	4,700	6,400	7,800	0	0
SD_0041 - Number of residential and commercial solar energy systems installed in Portland since 2006	EFFECTIVE	1,471	1,820	2,000	0	0

# Bureau of Planning & Sustainability

## Performance Measures

Performance Measure	Type	FY 2010-11 Year-End Actuals	FY 2011-12 Year-End Actuals	FY 2012-13 Revised Budget	FY 2013-14 Performance No Dec Pkg	FY 2013-14 Performance With Dec Pkg
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### Performance Measure Variance Descriptions

There is a significant increase in the number of residents reach by sustainable training and outreach in 11-12. This increase was based on the program's focus engaging the community around the new curbside collection system changes that affected 145,000 households. Program staff increased their presence at community and association events, as well as, going door-to-door answer questions and direct residents to resources.

Amt type2:

Following year carryforward (commitme

Vendor Name	Text	Sum of	Pymt Bdgt	Fall BMP Request
ACTUAL INDUSTRIES LLC	Actual Industries LLC Encumbrance		4,406	4,406
BAE URBAN ECONOMICS INC	BAE Urban Econ - 2391		50,000	50,000
BARNEY & WORTH INC	Comp Plan faciliation - 2083		34,985	34,985
BEVERLY BOOKIN	Beverly Bookin - 2625		7,000	7,000
COGAN OWENS COGAN LLC	Cogan Owens Cogan - 2661		50,000	50,000
DALY-STANDLEE & ASSOCIATES INC	Daily Standlee - Noise study Encumbrance		4,991	4,991
DEBORAH MEIHOFF	Deborah Meihoff (Communitas) - 2659		50,000	50,000
DOTZERO DESIGN INC	Dotzero Design Encumbrance		3,781	3,781
E D Hovee & Co LLC	ED Hovee - EOA consult - 2446		40,000	40,000
ECO NORTHWEST	Eco NW - WHI consult - 2389		30,000	30,000
HNTB CORPORATION	Professional Services HNTB		305	
INSTITUTE FOR CONFLICT	ICM Encumbrance		4,050	4,050
KEN MARTIN CONSULTING	Ken Martin Encumbrance		15,124	5,025
KVITKA DESIGN INC	Kvitka Design Encumbrance		2,000	2,000
LION HEART KOMBUCHA LLC	Lion Heart Kombucha		135	
OREGONIAN PUBLISHING CO	Oregonian - Advertising		-	
PETERSON MEDIA LLC	Peterson Media Encumbrance		3,000	3,000
PORTLAND COMMUNITY MEDIA	PCM Encumbrance		120,645	110,474
PORTLAND STATE UNIVERSITY	PSU - 30000642		22,123	
SETH WALKER	SETH WALKER PORTLAND PLAN EDITING		560	
SMILEY JOE LLC	Smiley Joe (Decisions) - 2657		50,000	50,000
	Smiley Joe Encumrance addition		5,000	
	Smiley Joe LLC Encumbrance		1,650	
	Smiley Joe PSComm		3,400	
	Hollywood Star Encumbrance		250	
STAR PUBLISHING INC	Todd Whalen Encumbrance		9,381	9,381
TODD WHALEN	Urban Cheesecraft		-	
URBAN CHEESECREFT	WILLAMETTE CRA ARCHAEOLOGICAL RESEARCH		3,019	
WILLAMETTE CULTURAL RESOURCES	ZGF Encumbrance		471	
ZIMMER GUNSUL FRASCA ARCHITECTS LLP	ZGF, 73593		161	
Grand Total			516,437	459,093

