



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

M E M O

September 30, 2013

To: City Budget Office

From: Susan Anderson

Subject: Spring BuMP – Bureau of Planning and Sustainability

With this cover memo I am conveying materials that comprise the FY13-14 Fall BuMP submittal for the Bureau of Planning and Sustainability and the Solid Waste Management Fund.

The Bureau requests an allocation of \$95,000 from General Fund as part of the Fall BMP to cover a budget deficit for staff and to allow the completion of the station area work and SE Quadrant Plan on the agreed to timeframe.

Thank you.



BUDGET AMENDMENT REQUEST

Bureau of Planning & Sustainability

PERIOD Fall BMP

FISCAL YEAR FY 2013-14

PN_001 - Grants Carryover

Appropriate or true up grants carryover in various BPS grants.

Dollar Amount: \$411,208
Type: Carryover Request
Resources: Grants

PN_002 - Appropriate bureau to bureau IA's

Appropriate bureau to bureau IA's to support GIS work (\$25,000) requested by BTS and Division-Midway project (\$18,270) requested by PBOT.

Dollar Amount: \$43,270
Type: New Request
Resources: New Revenues

PN_003 - IGA w/ PDC for Central City

True up PDC IGA to actual contract amount.

Dollar Amount: \$14,231
Type: New Request
Resources: New Revenues

PN_004 - Reallocation between Programs

Reallocate staff appropriation between planning programs as a result of re-organization.

Dollar Amount: \$0
Type: Technical Adjustment
Resources: General Fund Discretionary

PN_005 - appropriate sponsorship, ticket sales, rebates

Appropriate sponsorship and ticket sales and carryover from recycling rebates received from utilities.

Dollar Amount: \$85,550
Type: New Request
Resources: New Revenues

BUDGET AMENDMENT REQUEST

Bureau of Planning & Sustainability

PERIOD Fall BMP

FISCAL YEAR FY 2013-14

PN_006 - encumbrance carryover

Appropriate contract carryover for contract # 30002095 and contract # 30003342 committed in 12-13 for payments made in 13-14.

Dollar Amount: \$54,250
Type: Carryover Request
Resources: Bureau Contingency

PN_007 - Reallocation between Expenses and Programs

Recode appropriation between expense accounts and programs.

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

PN_008 - Appropriate ARRA Indirect Revenue

Appropriate ARRA indirect revenue to support bureau overhead cost

Dollar Amount: \$0
Type: New Request
Resources: New Revenues

PN_009 - Central City 2035: SE Quadrant Plan

Preparation of a new long range development plan for the SE Quadrant of the Central City is underway. At the same time, work is underway on station area planning for four new Portland MAX Stations now under construction in the SE Quadrant area. The station area work is funded partially through a Construction Excise Tax (CET) funded grant from Metro, and is an important input into the SE Quadrant Plan.

The Bureau decided to shorten the timeframe for delivery of the SE Quadrant Plan to December 2014. This has increased the overall workload and thus resulted in a slight delay in the completion date for the final two tasks and deliverables for the Metro CET Grant for the station areas. As a result, the Bureau will not be able to bill Metro for the work needed to complete the tasks until FY 14-15. This will result in a budget deficit for staff of \$95,000 in FY 13-14.

The Bureau requests an allocation of \$95,000 from General Fund as part of the Fall BMP to cover this deficit and to allow the completion of the station area work and SE Quadrant Plan on the agreed to timeframe.

Dollar Amount: \$95,000
Type: New Request
Resources: General Fund Discretionary

BUDGET AMENDMENT REQUEST

Bureau of Planning & Sustainability

PERIOD Fall BMP

FISCAL YEAR FY 2013-14

PN_010 - Additional PERS Savings

Additional PERS savings projected for internal services funds for FY 2013-14.

Dollar Amount: \$0

Type: Technical Adjustment

Resources: Internal Transfer

**Prior Year Business Area Reconciliation Report
GENERAL FUND 100000**

	FY 2012-13 Revised Budget	FY 2012-13 Year-End Actuals	Percent of Actuals to Revised
Bureau of Planning & Sustainability			
EXPENDITURES			
Personnel Services	\$7,271,449	\$7,252,583	100%
External Materials and Services	\$986,301	\$973,661	99%
Internal Materials and Services	\$907,758	\$968,475	107%
Fund Transfers - Expense	\$40,000	\$40,000	100%
TOTAL EXPENDITURES	\$9,205,508	\$9,234,719	100%
REVENUES			
Charges for Services	\$0	\$80	0%
Intergovernmental Revenues	\$623,383	\$624,365	100%
Interagency Revenue	\$189,667	\$169,227	89%
Miscellaneous	\$0	\$4,365	0%
General Fund Discretionary	\$7,863,397	\$0	0%
General Fund Overhead	\$529,061	\$0	0%
TOTAL REVENUES	\$9,205,508	\$798,037	9%

Bureau Reconciliation Narrative

General Fund 100000

Internal M&S – BPS submitted journal entries in AP13 to bill SWMF for its share of bureau overhead cost. The amount which reduced GF overhead expenses isn't included in the Internal M&S figure above. The variance is less than 3% when the adjustments are included.

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

Grants Fund 217000

Several multiyear grants were budgeted in FY12-13 with the ending dates beyond June, 2013. Carryover amounts are requested through the Fall BuMP Process to fund these programs through the end of grant periods.

Prior Year Fund Reconciliation Report

	FY 2012-13 Revised Budget	FY 2012-13 Year-End Actuals	Percent of Actuals to Revised
605 - Solid Waste Management Fund			
EXPENDITURES			
Unappropriated Fund Balance	136,378	0	0.00
Personnel Services	2,122,078	2,103,357	99.12
External Materials and Services	1,613,404	1,319,952	81.81
Internal Materials and Services	1,577,772	1,499,285	95.03
Bond Expenses	43,601	42,366	97.17
Fund Transfers - Expense	155,783	155,783	100.00
Contingency	1,290,773	0	0.00
TOTAL EXPENDITURES	6,939,789	5,120,744	73.79
REVENUES			
Budgeted Beginning Fund Balance	2,322,541	0	0.00
Licenses & Permits	2,553,721	2,714,993	106.32
Charges for Services	1,975,099	2,102,226	106.44
Intergovernmental Revenues	26,000	29,190	112.27
Interagency Revenue	13,500	8,500	62.96
Fund Transfers - Revenue	4,348	4,348	100.00
Miscellaneous	44,580	75,058	168.37
TOTAL REVENUES	6,939,789	4,934,315	71.10

Fund Reconciliation Narrative

External M&S – BPS requests about \$55K in carryover to cover contracts committed in FY 2012-13 and to be spent in FY 2013-14.

Intergovernmental Revenues – \$29,190 were collected from Metro to support the Neighborhood Cleanup Program

Interagency Revenue – IA revenues were collected based on actual expenses posted.

Misc. – BPS collected over \$75,000 in misc. revenue including interest on investments, rebates from haulers, and fees and sponsorship for Sustainability at Work, Build-It Green Tour of Homes, and other events. BPS requests appropriation in sponsorship and ticket sales for 2013-14 and recycling rebates collected to support 2013-14 expenses.

Bureau of Planning & Sustainability

Performance Measures

Performance Measure	Type	FY 2012-13 Adopted Budget	FY 2012-13 Revised Budget	FY 2012-13 Year-End Actuals		
PN_0006 - Citywide Livability Rating	EFFECTIVE	80%	79%	0%	0%	0%
PN_0013 - Overall Rating - Planning for Future Land Use	EFFECTIVE	40%	41%	0%	0%	0%
PN_0014 - Percent of significant natural resources protected through non-regulatory and/or regulatory measures	EFFECTIVE	81%	81%	0%	0%	0%
PN_0015 - Percent of residents rating neighborhood livability "good" or "very good"	EFFECTIVE	85%	86%	0%	0%	0%
PN_0016 - Percent of residents rating access to shopping and other services "good" or "very good"	EFFECTIVE	74%	74%	0%	0%	0%
PN_0019 - Percent of residents rating the attractiveness of new residential development "good" or "very good"	EFFECTIVE	63%	56%	0%	0%	0%
PN_0020 - Percent of housing built in four-county region within City of Portland limits	EFFECTIVE	32%	32%	35%	0%	0%
SD_0001 - Percent of residential material diverted from wastestream	EFFECTIVE	57%	70%	68%	0%	0%
SD_0002 - Percent of commercial material diverted from wastestream	EFFECTIVE	73%	67%	60%	0%	0%
SD_0003 - Residents reached by sustainability training and outreach	WORKLOAD	90,000	80,000	81,800	0	0
SD_0007 - Grants and contracts awarded	WORKLOAD	\$7,950,000	\$9,756,500	\$8,600,000	\$0	\$0
SD_0008 - Percent reduction in local per capita CO2 emissions from 1990 levels	EFFICIENCY	27%	26%	30%	0%	0%
SD_0014 - Pounds of solid waste generated per household	WORKLOAD	1,225	805	802	0	0
SD_0015 - Tons of solid waste generated by businesses	WORKLOAD	200,000	200,000	252,361	0	0
SD_0016 - Typical residential garbage and recycling monthly bill, adjusted for inflation (2000 dollars)	EFFICIENCY	\$29.60	\$29.70	\$29.70	\$0.00	\$0.00
SD_0018 - Citizens' satisfaction with solid waste and recycling programs (percent rating "good" or "very good")	EFFECTIVE	80%	66%	66%	0%	0%
SD_0019 - Businesses reached by sustainability outreach and training	WORKLOAD	1,000	1,000	941	0	0
SD_0020 - Number of multifamily units provided with recycling assistance	WORKLOAD	18,500	18,500	18,409	0	0
SD_0023 - Number of development projects provided with green building assistance	WORKLOAD	20	20	13	0	0
SD_0024 - Number of design and construction industry professionals trained in green building practices	WORKLOAD	1,000	1,000	1,565	0	0
SD_0025 - Per capita residential energy use (million BTUs)	EFFECTIVE	27.00	27.00	26.20	0.00	0.00
SD_0026 - Number of certified green buildings in Portland	EFFECTIVE	2,500	2,500	2,051	0	0
SD_0027 - Utility savings to City from energy- and water-efficiency projects and waste and toxics reduction (million dollars)	EFFECTIVE	\$5.40	\$5.50	\$5.60	\$0.00	\$0.00
SD_0028 - Percent of City electricity use from renewable resources	EFFECTIVE	15.0%	15.0%	15.0%	0.0%	0.0%
SD_0031 - Bureaus assisted with sustainability projects	WORKLOAD	26	26	26	0	0
SD_0032 - City employees provided with sustainability training	WORKLOAD	155	100	104	0	0
SD_0036 - Citizens participating in workshops	WORKLOAD	2,200	2,200	1,923	0	0
SD_0037 - Cost per Fix-It Fair participant	EFFICIENCY	\$58.00	\$58.00	\$56.00	\$0.00	\$0.00
SD_0041 - Number of residential and commercial solar energy systems installed in Portland since 2006	EFFECTIVE	2,200	2,100	2,160	0	0

Bureau of Planning & Sustainability

Performance Measures

Performance Measure	Type	FY 2012-13 Adopted Budget	FY 2012-13 Revised Budget	FY 2012-13 Year-End Actuals
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Performance Measure Variance Descriptions

PN_0006 to PN_0019: The data for 2012 will be available in October.

SD_0003 Residents reached by Sustainability training and outreach includes Be Cart Smart, Be Resourceful, and Master Recycler tabling and presentations; BIG, Your Sustainable City.

SD_0036 Citizens participating in workshops: This number is Fair attendees because workshop data was misplaced for one Fair.

Decision Package Updates

Comprehensive Plan

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, enabling the project to be completed in this aggressive timeframe.

The \$352,028 in one-time FY12-13 funds funded staff and professional services to perform required technical analysis and facilitation. BPS contracted with twelve consulting firms, three each in four specialty areas--economic analysis, planning, urban design and facilitation--and the work has proceeded on track.

West Hayden Island

This \$51,018 funding provided additional staff time that was critical to complete the West Hayden Island project. This involved 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 Planning and Sustainability Commission voted on the issue in July 2013 and forwarded its recommendations to City Council for consideration this fall.

Youth Planning

The Youth Planning Program hired youth ages 14-21 to work alongside planners and sustainability professionals with the goal of engaging youth in planning and civic life in an empowered way. Youth 18 and under makeup one-quarter of Portland's population, while youth 25 and under make up one-third. This \$63,726 funding implemented 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. The Youth Planning program concluded as scheduled in late 2012.