



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

M E M O

March 30, 2015

To: City Budget Office

From: Susan Anderson

Subject: Spring BuMP – Bureau of Planning and Sustainability

With this cover memo I am conveying the FY14-15 Spring BuMP submittal for the Bureau of Planning and Sustainability and the Solid Waste Management Fund.

The Bureau requests an allocation of \$150,000 from the General Fund to initiate the time-sensitive Single-Dwelling Development Code project and \$35,000 for three Innovation Fund projects that have been awarded funding.

Thank you.



Summary of BuMP Requests by Bureau

	Bureau Request		FPD Recommendation	
	Gen Fund Discretionary	Total Expenses	Gen Fund Discretionary	Total Expenses
Bureau of Planning & Sustainability				
PN_010 - PBOT IAA to support comp plan work	0	0	0	0
PN_011 - IAA w/ PBEM, Water, and Housing	0	43,000	0	43,000
PN_012 - Innovation Fund Projects	35,000	35,000	35,000	35,000
PN_013 - Budget adjs between FA and GL	0	0	0	0
PN_014 - Single-Dwelling Development Code project	150,000	150,000	150,000	150,000
PN_015 - COLA adjs in SWMF	0	0	0	0
PN_016 - IGA w/ PDC to support Clean Energy	0	5,000	0	5,000
Total Bureau of Planning & Sustainability	185,000	233,000	185,000	233,000
Grand Total	185,000	233,000	185,000	233,000

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: Technical Adjustment

Request: PN_010 - PBOT IAA to support comp plan work

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Personnel Services	(15,000)	0	(15,000)
External Materials and Services	(20,000)	0	(20,000)
Internal Materials and Services	35,000	0	35,000
TOTAL EXPENDITURES	0	0	0

Bureau Description:

Request additional PBOT IAA to support comp plan work, \$20,000 from GF and \$15,000 from DLCD Grant.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_011 - IAA w/ PBEM, Water, and Housing

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Personnel Services	1,000	0	1,000
External Materials and Services	42,000	0	42,000
TOTAL EXPENDITURES	43,000	0	43,000
REVENUES			
Interagency Revenue	43,000	0	43,000
TOTAL REVENUES	43,000	0	43,000

Bureau Description:

Request additional IAA w/ PBEM, Water, and Housing for a total of \$43,000 for BPS to provide services to the respective bureaus on GIS, sustainable outreach, and bonus study.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: Technical Adjustment

Request: PN_012 - Innovation Fund Projects

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Personnel Services	10,000	0	10,000
External Materials and Services	25,000	0	25,000
TOTAL EXPENDITURES	35,000	0	35,000
REVENUES			
General Fund Discretionary	35,000	0	35,000
TOTAL REVENUES	35,000	0	35,000

Bureau Description:

Appropriate total of \$35,000 to support three innovation projects, \$10K for PSU-BPS coordination, \$10K for Making Great Decisions Tool, \$15K for Anti-Litter Campaign Toolkit.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: Technical Adjustment

Request: PN_013 - Budget adjs between FA and GL

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
External Materials and Services	0	0	0
Internal Materials and Services	0	0	0
TOTAL EXPENDITURES	0	0	0
REVENUES			
Intergovernmental Revenues	0	0	0
TOTAL REVENUES	0	0	0

Bureau Description:

1. Reallocate budget appropriation for Metro Recycle Grant per grant agreement.
2. To correct budget adjustments which moved twice between bureau functional areas.
3. Correct negative budget appropriation and reallocate to appropriate program.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_014 - Single-Dwelling Development Code project

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
External Materials and Services	150,000	0	150,000
TOTAL EXPENDITURES	150,000	0	150,000
REVENUES			
General Fund Discretionary	150,000	0	150,000
TOTAL REVENUES	150,000	0	150,000

Bureau Description:

Request \$150,000 for Consultant Services to support the Single-Dwelling Development Code project.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: Technical Adjustment

Request: PN_015 - COLA adjs in SWMF

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Unappropriated Fund Balance	(25,000)	0	(25,000)
Personnel Services	25,000	0	25,000
TOTAL EXPENDITURES	0	0	0

Bureau Description:

Request \$25K from cost of living set aside to cover SWMF personal services.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2014-15 Spring Supplemental Budget**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_016 - IGA w/ PDC to support Community Solar

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Personnel Services	5,000	0	5,000
TOTAL EXPENDITURES	5,000	0	5,000
REVENUES			
Intergovernmental Revenues	5,000	0	5,000
TOTAL REVENUES	5,000	0	5,000

Bureau Description:

Appropriate \$5,000 received from PDC IGA to support the Community Solar project.

CBO Discussion and Recommendation

**Business Area Projection Report
GENERAL FUND 100000**

	Spring BMP Revised Budget	FY 2014-15 YTD Actuals Thru AP8	Spring BMP Year-End Projection	% of Projected Actuals to Revised Bud
Bureau of Planning & Sustainability				
EXPENDITURES				
Personnel Services	\$7,236,662	\$4,754,630	\$7,199,862	99%
External Materials and Services	\$1,020,527	\$408,773	\$870,527	85%
Internal Materials and Services	\$689,218	\$573,728	\$689,218	100%
TOTAL EXPENDITURES	\$8,946,407	\$5,737,131	\$8,759,607	98%
REVENUES				
Intergovernmental Revenues	\$186,648	\$0	\$186,648	100%
Interagency Revenue	\$456,452	\$236,003	\$406,452	89%
Miscellaneous	\$0	\$12,885	\$13,200	0%
General Fund Discretionary	\$7,715,760	\$0	\$7,565,760	98%
General Fund Overhead	\$587,547	\$0	\$587,547	100%
TOTAL REVENUES	\$8,946,407	\$248,888	\$8,759,607	98%

Bureau Projection Narrative

General Fund 100000

BPS anticipates to fully spend the budget in all major expense categories except Internal M&S as noted below. BPS will also fully spend or commit the contract dollars before the end of the fiscal year and does not anticipate any carryover except funding requested in the Spring BuMP to support the Single-Dwelling Development Code project which BPS plans to carry over the full amount (\$150,000) into FY 2015-16.

Internal M&S: due to delays in starting the projects, BPS will only bill \$55K out of the \$105K budgeted in PBOT IAA for the SW Corridor and Parking TGM projects.

Grants Fund 217000-217007

BPS anticipates small amount of carryover into FY 2015-16. We have majority of the carryover funding appropriated in the 2015-16 Requested Budget.

**Business Area Projection Report
GRANTS FUND 217000-217007**

	Spring BMP Revised Budget	FY 2014-15 YTD Actuals Thru AP8	Spring BMP Year-End Projection	% of Projected Actuals to Revised Bud
Bureau of Planning & Sustainability				
EXPENDITURES				
Personnel Services	\$1,250,339	\$875,783	\$1,175,339	94%
External Materials and Services	\$373,995	\$235,540	\$373,995	100%
Internal Materials and Services	\$303,219	\$176,186	\$303,219	100%
Fund Transfers - Expense	\$0	\$0	\$0	0%
TOTAL EXPENDITURES	\$1,927,553	\$1,287,510	\$1,852,553	96%
REVENUES				
Intergovernmental Revenues	\$1,927,553	\$1,298,070	\$1,852,553	96%
TOTAL REVENUES	\$1,927,553	\$1,298,070	\$1,852,553	96%

Bureau Projection Narrative

General Fund 100000

BPS anticipates to fully spend the budget in all major expense categories except Internal M&S as noted below. BPS will also fully spend or commit the contract dollars before the end of the fiscal year and does not anticipate any carryover except funding requested in the Spring BuMP to support the Single-Dwelling Development Code project which BPS plans to carry over the full amount (\$150,000) into FY 2015-16.

Internal M&S: due to delays in starting the projects, BPS will only bill \$55K out of the \$105K budgeted in PBOT IAA for the SW Corridor and Parking TGM projects.

Grants Fund 217000-217007

BPS anticipates small amount of carryover into FY 2015-16. We have majority of the carryover funding appropriated in the 2015-16 Requested Budget.

Fund Projection Report

	Spring BMP Revised Budget	FY 2014-15 YTD Actuals Thru AP8	Spring BMP Year-End Projection	% of Projected Actuals to Revised Bud
Community Solar Fund				
EXPENDITURES				
Unappropriated Fund Balance	\$0	\$0	\$27,718	
Personnel Services	\$5,000	\$4,816	\$5,000	100%
External Materials and Services	\$25,000	(\$2,338)	\$5,000	20%
TOTAL EXPENDITURES	\$30,000	\$2,478	\$37,718	126%
REVENUES				
Budgeted Beginning Fund Balance	\$0	\$0	\$17,718	
Intergovernmental Revenues	\$5,000	\$0	\$5,000	100%
Miscellaneous	\$25,000	\$13,391	\$15,000	60%
TOTAL REVENUES	\$30,000	\$13,391	\$37,718	126%

Fund Projection Narrative

Community Solar Fund 224000

The Community Solar Fund was established in 2013-14 and began receiving revenue, but the first solar installations paid from the fund were delayed till fall 2014. BPS anticipates to spend most of the fund balance on solar projects in 2015-16.

Fund Projection Report

	Spring BMP Revised Budget	FY 2014-15 YTD Actuals Thru AP8	Spring BMP Year-End Projection	% of Projected Actuals to Revised Bud
Solid Waste Management Fund				
EXPENDITURES				
Unappropriated Fund Balance	\$2,405,131	\$0	\$2,752,560	114%
Personnel Services	\$2,222,751	\$1,468,327	\$2,221,520	100%
External Materials and Services	\$1,160,332	\$412,522	\$1,160,332	100%
Internal Materials and Services	\$1,527,632	\$762,020	\$1,527,632	100%
Bond Expenses	\$52,307	\$8,138	\$52,307	100%
Fund Transfers - Expense	\$164,254	\$109,507	\$164,254	100%
TOTAL EXPENDITURES	\$7,532,407	\$2,760,515	\$7,878,605	105%
REVENUES				
Budgeted Beginning Fund Balance	\$2,370,812	\$0	\$2,717,010	115%
Licenses & Permits	\$2,851,643	\$1,402,006	\$2,851,643	100%
Charges for Services	\$2,223,486	\$1,212,072	\$2,223,486	100%
Intergovernmental Revenues	\$26,000	\$0	\$26,000	100%
Interagency Revenue	\$12,000	\$0	\$12,000	100%
Miscellaneous	\$48,466	\$41,218	\$48,466	100%
TOTAL REVENUES	\$7,532,407	\$2,655,296	\$7,878,605	105%

Fund Projection Narrative

Solid Waste Management Fund 605000

BPS anticipates to spend most of its budget in all expense categories and collects residential and commercial revenues as planned.

BPS requests \$25K from cost of living set aside to cover the needed personal services expenses due to COLA increase.

Spring BMP request

Bureau of Planning and Sustainability

Single-Dwelling Development Code project

\$150,000 for External Materials and Supplies: Consultant Services

Today Portland has approximately 148,000 single-dwelling zoned lots with 132,000 detached and 1,200 attached (row houses) single-dwelling structures. Over the next 25 years, Portland is forecast to grow by over 120,000 new housing units. Approximately 18,000 of these (20%) will be detached single-dwelling units (e.g., house or duplex)—more than 700 per year.

Recent experience with single family infill has raised concern that some new development is unacceptably out-of-scale with the surrounding houses. This is often the result of infill development that involves demolition and replacement of existing houses or new development on lots created by property line adjustments on historically platted narrow/small lots.

Some community members have experienced this development as an unexpected increase in the number of houses on a block. The design and scale of the new buildings are criticized as incompatible with neighboring houses. On the other hand, one can see this development as meeting a market demand and housing need. It also represents desirable new investment and modernization of the city housing stock.

Since demand for housing in Portland single-family neighborhoods is expected to continue to grow, it is important to examine how development rules can mediate these conflicts while increasing the options for households to find housing in these neighborhoods. The Single-Dwelling Development Code project is intended to address these issues.

A major component of the Single-Dwelling project is proposed as an add-package in the FY 15-16 budget. The level of funding requested for FY 15-16 did not include the funding for professional consulting services needed to initiate the project, however, since BPS anticipated requesting funds for the scoping and analysis phase as part of the Spring BuMP. The funding requested here will fund professional consultant services for architecture/planning, economic analysis and facilitation.

Consultants will analyze the range of lot configurations and development situations encountered in single-dwelling zoned neighborhoods. They will prepare materials to communicate options for changing single-dwelling zoning standards and evaluate the options in terms of effectiveness and impact on development costs and feasibility. The project is likely to be controversial, potentially impact a large number of properties, and have a high level of community and development industry interest. It will include a steering committee. Facilitation services are key to support this committee and related public outreach.

Funding these services as part of the Spring BMP will allow BPS to move immediately to start the process to get consultants under contract. This will allow work to start early in FY 15-16 and increase the possibility of carrying out a focused and efficient process.

Single-Dwelling Development Code Project (wmulti-year project

FY14-15 Spring BMP		150,000	Architecture/planning consultant Economic analysis services Facilitation services
Consultant Services			
FY15-16			Deliverables: 1. New Single-Dwelling Development Standards 2. New regulations related to skinny lots 3. Code Amendments for more and innovative single-dwelling development 4. Research into infill development in PDX and best practices nationally 5. Advisory Committee and Public Outreach 6. Measure 56 notice to ~150,000 properties 7. 12 to 18 month process
Staff	2.6 FTE	266,400	
Other M&S		<u>67,000</u>	
		333,400	
FY16-17			
Staff	.9 FTE	124,000	
TOTAL			
		<u>607,400</u>	

budget)

2014-15 Decision Package Updates

State-Mandated Planning and Code Projects:

BuMP Update: BPS delivered a Proposed Draft of the 2035 Comprehensive Plan to the Planning and Sustainability Commission (PSC) on July 21, 2014. At the same time, BPS launched an online MapApp and a staffed help line. The PSC held five public hearings and ultimately extended the deadline for written comments to March 13, 2015. The PSC received over 4,000 public comments, including email, letters, oral testimony, and MapApp entries. The commission is now holding work sessions to develop recommendations to City Council, which we expect to be transmitted by June 2015. BPS is also preparing implementation recommendations for commercial mixed Use development, campus institutional growth, and employment lands. Zoning Map amendment proposals are also being developed. The PSC will begin holding public hearings on these implementation projects in the coming months.

Regulatory Improvement Code Amendment Packages (RICAP): Directs BDS to provide \$235,452 funding for the bureau's regulatory Improvement Code Amendment Packages (RICAP).

BuMP Update: During 2014 and 2015, RICAP 6 was completed with the approval of the Accessory Short-term rental code amendments, effective August 2014. Staff worked with City Council to create regulations for short-term rentals related to multi-dwelling development, which was effective February 2015. The workplan for RICAP 7 was approved by the Planning and Sustainability Commission (PSC) in August 2014. Staff is preparing to release the RICAP 7 Proposed Draft Amendments at the end of March 2015, in anticipation of a PSC hearing on April 28, 2015.

Salmon Safe

BuMP Updates: The City entered into a contract with Salmon-Safe in November 2014, and the Salmon-Safe City project is on schedule in the first year of what is expected to be a three-year project. The Salmon-Safe project team (BPS, BES, Water, PBOT, Salmon-Safe) has reviewed City plans, policies, and procedures for consistency with Salmon-Safe principles and standards. The Salmon-Safe team has also collaborated closely with BES, Water and PBOT staff in evaluating building, land, and facility management programs for the Bureaus of Environmental Services, Water, and Transportation. The project team has focused on programs that have the potential to affect water quality, salmon habitat, and watershed health. The team has also conducted field assessments at selected bureau sites. Additional analysis will take place in spring 2015, and Salmon-Safe is

developing a draft report documenting their assessment work and presenting recommended actions and conditions for Salmon-Safe certification of the three bureaus. Salmon-Safe will be collaborating with the Bureau of Planning and Sustainability, which is administering the contract, and other City staff to identify additional participant bureaus, and initial scoping sessions for implementation beginning in year 2 (FY 2015-16).