



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

MEMO

September 12, 2018

To: City Budget Office

From: Susan Anderson 

Subject: Fall BuMP - Bureau of Planning and Sustainability

With this cover memo I am conveying the FY18-19 Fall BuMP submittal for the Bureau of Planning and Sustainability, the Solid Waste Management Fund, and the Community Solar Fund.

The Bureau requests an additional \$284,000 from the General Fund to cover \$11,000 in encumbrance carryover and \$273,000 in one-time request to continue existing planning and code development projects. The BuMP also includes about \$436,000 in grants carryover to continue grant funded projects, \$385,000 in Solid Waste Management Fund carryover to continue contract work and project efforts, \$357,000 in interagency agreements with OMF Special Appropriation, PBOT, and BES.

Thank you.



**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: Technical Adjustment

Request: PN_001 - Grants Technical Adjustments

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|---|---|---|
| EXPENDITURES | | | |
| Personnel Services | 76,013 | 0 | 76,013 |
| External Materials and Services | 274,438 | 0 | 274,438 |
| Internal Materials and Services | 85,720 | 0 | 85,720 |
| TOTAL EXPENDITURES | 436,171 | 0 | 436,171 |
| REVENUES | | | |
| Intergovernmental Revenues | 436,171 | 0 | 436,171 |
| TOTAL REVENUES | 436,171 | 0 | 436,171 |

Bureau Description:

Technical adjustments to true-up grant expenses for all grants including PN-60, PN-61, PN-62, PN-68, PN-70, PN-71, PN-72, PN-73, PN-74, PN-76, PN-77, PN-78, SD08 and SD14

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_002 - Inter-Agency Agreements

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|---|---|---|
| EXPENDITURES | | | |
| Personnel Services | 357,194 | 0 | 357,194 |
| External Materials and Services | 0 | 0 | 0 |
| TOTAL EXPENDITURES | 357,194 | 0 | 357,194 |
| REVENUES | | | |
| Interagency Revenue | 357,194 | 0 | 357,194 |
| TOTAL REVENUES | 357,194 | 0 | 357,194 |
| FTE | | | |
| Limited Term Positions | 1.00 | 0.00 | 1.00 |
| Part-Time Positions | 0.75 | 0.00 | 0.75 |
| TOTAL FTE | 1.75 | 0.00 | 1.75 |

Bureau Description:

IAA with PBOT for Streetcar System Extension: \$77,000 IAA from PBOT to BPS for Streetcar System Extension, which BPS helps the project team on land use policy, employment and housing impacts, equity analysis and community involvement.

IAA with OMF and BES for Floodplain Management Update funded the following new positions:

- 0.75 FTE GIS Technician II funded by OMF special appropriations for \$26,491 and by BES for \$50,000. GIS analyses to determine the impact of existing and proposed regulations on natural floodplain function and storage and floodplain habitat; creates new maps as needed and correct existing GIS layers.
- 1 FTE City Planner II-Environmental funded by OMF special appropriations for \$143,067. City Planner II conducts review to identify river-dependent and river-related development along the Willamette River, and analyses Portland regulations and development to support the work of FMUP.

City's Title 13 Specified Animals Code: Special Appropriation of \$60,636 from OMF to BPS for Title 13 Specified Animals code, which involves a customer helpline, issuing permits and enforcement activities.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: Encumbrance Carryover Request

Request: PN_003 - Encumbrance Carryover_GF

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|--------------------------------------|------------------------------------|----------------------------------|
| EXPENDITURES | | | |
| Personnel Services | 0 | 0 | 0 |
| External Materials and Services | 10,942 | 0 | 10,942 |
| TOTAL EXPENDITURES | 10,942 | 0 | 10,942 |
| REVENUES | | | |
| Interagency Revenue | 0 | 0 | 0 |
| General Fund Discretionary | 10,942 | 0 | 10,942 |
| TOTAL REVENUES | 10,942 | 0 | 10,942 |

Bureau Description:

Request encumbrance carryover from the General Fund to pay for contracts committed in 2017-18, \$10,942.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: Encumbrance Carryover Request

Request: PN_004 - Encumbrance Carryover_SWMF

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|--------------------------------------|------------------------------------|----------------------------------|
| EXPENDITURES | | | |
| External Materials and Services | 364,000 | 0 | 364,000 |
| TOTAL EXPENDITURES | 364,000 | 0 | 364,000 |
| REVENUES | | | |
| Budgeted Beginning Fund Balance | 364,000 | 0 | 364,000 |
| Interagency Revenue | 0 | 0 | 0 |
| TOTAL REVENUES | 364,000 | 0 | 364,000 |

Bureau Description:

- Request encumbrance carryover from the Solid Waste Management Fund to pay for contracts committed in 2017-18, total \$364,000.
- Daisy Cloud Contract No. 31001189, DPO No. 22235630, \$11,500
 - Community Energy Project Contract No. 31001191, DPO No. 22229774, \$15,000
 - Public Trash Cans Expansion, Spring BuMP program carryover approved by City Council, \$337,500

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: Program Carryover Request

Request: PN_005 - Misc. Revenue

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|---|---|---|
| EXPENDITURES | | | |
| Personnel Services | 0 | 0 | 0 |
| External Materials and Services | 21,500 | 0 | 21,500 |
| TOTAL EXPENDITURES | 21,500 | 0 | 21,500 |
| REVENUES | | | |
| Budgeted Beginning Fund Balance | 21,500 | 0 | 21,500 |
| Interagency Revenue | 0 | 0 | 0 |
| TOTAL REVENUES | 21,500 | 0 | 21,500 |

Bureau Description:

- Request misc. revenue carryover from the Solid Waste Management Fund to continue work.
- Fix-It Fair sponsorship received from Energy Trust of Oregon in FY 2017-18 to be expensed in 2018-19, \$1,500.
 - Recycling Rebates received from garbage haulers from past years to be expensed by bureaus, \$20,000.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: Technical Adjustment

Request: PN_006 - reallocate budget to appropriate programs

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|---|---|---|
| EXPENDITURES | | | |
| Personnel Services | (65,000) | 0 | (65,000) |
| External Materials and Services | 64,915 | 0 | 64,915 |
| Internal Materials and Services | (999,915) | 0 | (999,915) |
| Fund Transfers - Expense | 1,000,000 | 0 | 1,000,000 |
| TOTAL EXPENDITURES | 0 | 0 | 0 |

Bureau Description:

Request technical adjustments to reallocate budget to appropriate programs and GL expenses.

- Reallocate budget to a newly created functional area “public trash cans”, \$1,115,000.
- Reallocate funding for the HUCIRP program from IAA to Cash Transfer between Facilities and BPS, \$1,000,000.
- Transfer salary savings from delays in hiring a Graphic Designer II position and use to hire contractors instead, \$65,000.
- Reallocate Occupational Health and Flu shot budget from Risk to BHR, \$574.
- Increase DCTU professional development by \$85.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_007 - \$188,000 One-Time Request for DOZA Project

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|---|---|---|
| EXPENDITURES | | | |
| Personnel Services | 70,000 | 0 | 70,000 |
| External Materials and Services | 118,000 | 0 | 118,000 |
| TOTAL EXPENDITURES | 188,000 | 0 | 188,000 |
| REVENUES | | | |
| General Fund Discretionary | 188,000 | 0 | 188,000 |
| TOTAL REVENUES | 188,000 | 0 | 188,000 |

Bureau Description:

Total \$188,000 one-time request to complete DOZA project

- \$118,000 is to develop schematic designs to test staff's proposals which occurs in FY18-19 and being performed under an already signed contract with DECA Architects. Funding from GF is needed because the original source of funding - an IA w/ BDS - is no longer available due to permit fee shortfalls.

- \$70,000 is needed to continue a currently filled Planning Assistant position we have working on DOZA. Funding from GF is needed because the original source of funding - an IA w/ BDS - is no longer available due to permit fee shortfalls.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_008 - \$35,000 for Residential Infill Project

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|--------------------------------------|------------------------------------|----------------------------------|
| EXPENDITURES | | | |
| External Materials and Services | 35,000 | 0 | 35,000 |
| 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:

Total \$35,000 One-time Request for Residential Infill Project

- The Residential Infill Project was delayed during its PSC phase and will be completed in FY18-19. The scale of changes coming out of the PSC process require additional technical analyses and notices to be able to forward the proposal to City Council in January 2019.
- \$25,000 is needed for economic and transportation analyses to be performed by consultants and PBOT. \$10,000 is needed for additional public notices to those who testified and new properties that are affected by the amendments. Funding from GF is needed because the original source of funding - an IA w/ BDS - is no longer available due to permit fee shortfalls.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Bureau of Planning & Sustainability

Type: New Request

Request: PN_009 - \$50,000 for SW Corridor and SW Equitable

| | Fall BMP Requested Adjustments | Fall BMP CBO/Council Changes | Fall BMP Total Adjustments |
|---------------------------------|---|---|---|
| EXPENDITURES | | | |
| External Materials and Services | 50,000 | 0 | 50,000 |
| TOTAL EXPENDITURES | 50,000 | 0 | 50,000 |
| REVENUES | | | |
| General Fund Discretionary | 50,000 | 0 | 50,000 |
| TOTAL REVENUES | 50,000 | 0 | 50,000 |

Bureau Description:

\$50,000 one-time funding request is to support the creation of a formal SW Corridor "Collaborative" organization to carry on the work of the SW Equitable Development Strategy. The Collaborative will be organized with nonprofits in the SW corridor, including housing providers, philanthropy, and some rental/tenant services groups.

In other regions such as Denver, Chicago, and the Bay Area, public/private collaboratives like proposed here have proven to be a best practice in creating broad buy-in to major transit and affordable housing investments.

The funds would build a foundation for this collaborative by organizing community interests and supporting the work of community-based organizations currently working together and with the City of Portland on anti-displacement strategies. Metro has already committed an additional \$50,000 as part of a larger grant to BPS. The funds would be competitively awarded in a grant to a non-governmental organization working in the SW Corridor. We anticipate another round of funding in in FY 19-20, after which the Collaborative would be in a position to seek private funding.

CBO Discussion and Recommendation

**Prior Year Business Area Reconciliation Report
General Fund**

| | FY 2017-18 Revised Budget | FY 2017-18 Year-End Actuals | Percent of Actuals to Revised |
|--|---------------------------------|-----------------------------------|-------------------------------------|
| Bureau of Planning & Sustainability | | | |
| EXPENDITURES | | | |
| Personnel Services | \$8,539,998 | \$8,479,088 | 99% |
| External Materials and Services | \$1,254,784 | \$983,282 | 78% |
| Internal Materials and Services | \$456,447 | \$395,122 | 87% |
| TOTAL EXPENDITURES | \$10,251,229 | \$9,857,492 | 96% |
| REVENUES | | | |
| Charges for Services | \$0 | \$5,179 | 0% |
| Interagency Revenue | \$1,517,850 | \$1,129,557 | 74% |
| Miscellaneous | \$0 | \$319 | 0% |
| General Fund Discretionary | \$7,974,344 | \$0 | 0% |
| General Fund Overhead | \$759,035 | \$0 | 0% |
| TOTAL REVENUES | \$10,251,229 | \$1,135,056 | 11% |

Bureau Reconciliation Narrative

General Fund 100000

External and Internal M&S – BPS requests \$10,942 in one-time General Fund to pay for purchase orders committed in FY 2017-18 to continue technical work and communication needs for the Planning program. The variance in Internal M&S is due to delays in project funded by PBOT bureau to bureau IAA in FY 2017-18.

Interagency Revenue – This is mainly due to delays in projects funded by BDS. BPS has submitted requests to continue work in Fall BuMP.

Grants Fund 217000-217007

Personnel Services, External and Internal M&S – The variances are due to continuation of Metro and other grant projects. The balances of these multi-year grants are requested to be carried over into FY 2018-19 and are included in the Fall BuMP. The total grants carryover amount is about \$436,000.

Capital Outlay – BPS submitted an OEO request which was not included in the ordinance for council approval, therefore the budget wasn't reallocated to cover the expense.

**Prior Year Business Area Reconciliation Report
Grants Fund**

| | FY 2017-18 Revised Budget | FY 2017-18 Year-End Actuals | Percent of Actuals to Revised |
|--|---------------------------------|-----------------------------------|-------------------------------------|
| Bureau of Planning & Sustainability | | | |
| EXPENDITURES | | | |
| Personnel Services | \$1,042,823 | \$849,789 | 81% |
| External Materials and Services | \$856,768 | \$578,538 | 68% |
| Internal Materials and Services | \$270,010 | \$164,338 | 61% |
| Capital Outlay | \$0 | \$18,000 | 0% |
| TOTAL EXPENDITURES | \$2,169,601 | \$1,610,665 | 74% |
| REVENUES | | | |
| Intergovernmental Revenues | \$2,169,601 | \$1,948,947 | 90% |
| TOTAL REVENUES | \$2,169,601 | \$1,948,947 | 90% |

Bureau Reconciliation Narrative

General Fund 100000

External and Internal M&S – BPS requests \$10,942 in one-time General Fund to pay for purchase orders committed in FY 2017-18 to continue technical work and communication needs for the Planning program. The variance in Internal M&S is due to delays in project funded by PBOT bureau to bureau IAA in FY 2017-18.

Interagency Revenue – This is mainly due to delays in projects funded by BDS. BPS has submitted requests to continue work in Fall BuMP.

Grants Fund 217000-217007

Personnel Services, External and Internal M&S – The variances are due to continuation of Metro and other grant projects. The balances of these multi-year grants are requested to be carried over into FY 2018-19 and are included in the Fall BuMP. The total grants carryover amount is about \$436,000.

Capital Outlay – BPS submitted an OEO request which was not included in the ordinance for council approval, therefore the budget wasn't reallocated to cover the expense.

Prior Year Fund Reconciliation Report

| | FY 2017-18 Revised Budget | FY 2017-18 Year-End Actuals | Percent of Actuals to Revised |
|--|---------------------------------|-----------------------------------|-------------------------------------|
| 605 - Solid Waste Management Fund | | | |
| EXPENDITURES | | | |
| Unappropriated Fund Balance | 3,882,477 | 0 | 0.00 |
| Personnel Services | 2,491,577 | 2,216,342 | 88.95 |
| External Materials and Services | 1,354,136 | 1,163,785 | 85.94 |
| Internal Materials and Services | 1,840,957 | 1,827,444 | 99.27 |
| Bond Expenses | 67,638 | 66,579 | 98.43 |
| Fund Transfers - Expense | 193,194 | 193,194 | 100.00 |
| Contingency | 68,293 | 0 | 0.00 |
| TOTAL EXPENDITURES | 9,898,272 | 5,467,344 | 55.24 |
| REVENUES | | | |
| Budgeted Beginning Fund Balance | 3,811,791 | 0 | 0.00 |
| Licenses & Permits | 2,995,133 | 2,986,707 | 99.72 |
| Charges for Services | 3,002,909 | 3,202,378 | 106.64 |
| Interagency Revenue | 5,000 | 5,000 | 100.00 |
| Miscellaneous | 83,439 | 71,669 | 85.89 |
| TOTAL REVENUES | 9,898,272 | 6,265,754 | 63.30 |

Fund Reconciliation Narrative

Solid Waste Management Fund 605000

Personnel Services –The Personnel wasn't fully spent due to a vacant position and staff which was redirected and billed to non-solid waste programs.

External M&S –This is mainly due to two contracts related to Energy Score which contracts were committed but was not completed due to delays of the project. About \$15,000 is included in the Fall BuMP through Encumbrance Carryover to continue the work in FY 2018-19.

Prior Year Fund Reconciliation Report

| | FY 2017-18 Revised Budget | FY 2017-18 Year-End Actuals | Percent of Actuals to Revised |
|-----------------------------------|---------------------------------|-----------------------------------|-------------------------------------|
| 224 - Community Solar Fund | | | |
| EXPENDITURES | | | |
| External Materials and Services | 61,672 | 0 | 0.00 |
| Fund Transfers - Expense | 84 | 84 | 100.00 |
| TOTAL EXPENDITURES | 61,756 | 84 | 0.14 |
| REVENUES | | | |
| Budgeted Beginning Fund Balance | 52,772 | 0 | 0.00 |
| Miscellaneous | 8,984 | 9,225 | 102.68 |
| TOTAL REVENUES | 61,756 | 9,225 | 14.94 |

Fund Reconciliation Narrative

Community Solar Fund 224000

The Community Solar Fund was established in 2013-14 and began receiving revenue. The first solar installations were paid from the fund in Fall 2014, mostly funded by a Clean Energy Grant from the Oregon Community Foundation.

The state passed community solar legislation in 2016, and BPS expects a program to be up and running in FY 18-19. Our funds likely will accumulate until they can be deployed in service of community solar efforts in Portland, in partnership with the private sector.

Bureau of Planning & Sustainability Response to Budget Note

FY 2018-19 Adopted Budget

The following budget note was included in the Mayor's proposed budget. This document is in response to that directive.

Bureau of Planning & Sustainability

Light Pollution Based on the Central City 2035 plan, Council directs the Bureau of Planning and Sustainability to present a project timeline related to mitigating light pollution to Council as part of the Fall 2018 Budget Monitoring Process. This project timeline should include the following components: identification of lead staff with BPS; estimates for an analysis of best practices related to a "dark skies" initiative; an outline of next steps needed for implementation within five years, including options for expedited implementation based on budget allocation.

The Problem

The proliferation of excessive artificial light, produced primarily by large buildings and outdoor light fixtures, has led to damaging ecological, financial, and cultural impacts for the City of Portland. Over-lit buildings and poorly designed exterior lighting are hindering Portland's Climate Action targets, causing inefficient energy use and spending as well as producing additional greenhouse gas emissions and air pollutants. Furthermore, light emitted upwards at night is known to attract and disorient migratory birds, leading to an increase in bird mortality in urban centers. Finally, this excess light makes it difficult for Portlanders to see the night sky.

Draft Approach

Phase I. Research and Analysis and Recommendations for Phase II.

- Review existing materials to clarify:
 - What have other cities done to address light pollution? What are the best practices for this?
 - What is the scope of the problem in Portland? Outdoor lighting-exterior building lights, landscaping lights, street lights, signs, etc. Indoor lighting-high rise, houses, businesses, etc.
 - What kinds of lights are more problematic than others, etc.
- What progress have we made through existing projects and programs?
- What can we do to address lighting from existing development?
- Gather cost estimates for retrofit vs replacement of streetlights and other things.
- Draft a report summarizing the above and recommendations for next steps including the geography.
- Circulate for review and comment.
- Finalize scope for Phase II.

Phase II. Discussion Draft

- Prepare a Discussion Draft to move actions identified in Phase I forward
- Public review and comment
- Finalize recommendations for Phase III

Phase III. Legislative / Decision Making Process

- Zoning code amendments? Design Guideline amendments?
- Capital Improvement Project recommendations

Draft Budget

1 FTE City Planner II: ~\$130,000 (fully loaded)

Staffing

BPS:

Environmental Manager .1 FTE
 New Project Manager .9 FTE
 Urban Design staff .1 FTE
 Energy efficiency staff .05 FTE

Other:

PBOT staff .05 FTE
 Parks staff .05 FTE
 BES staff .05 FTE

Timeline

| | |
|-------------------|--|
| October 2018 | BPS responds to Budget Note and gets council feedback |
| January 2019 | BPS submits proposed budget |
| | <i>If we get funding...</i> |
| July /August 2019 | BPS hires project manager or reassigns existing staff |
| October 2019 | Phase I Background document and Phase II scope complete. |
| January 2020 | Phase II. Discussion Draft: public review for 45-60 days |
| | <i>If a legislative project is warranted....</i> |
| April 2020 | Phase III. Release Proposed Draft |
| May 2020 | PSC Hearings and (possibly Design Commission if not part of the Fundamentals process) |
| July 2020 | Release Recommended Draft |
| September 2020 | City Council Hearings/Decision (Ordinance-Title 33 + Resolution directing City Bureaus) Lights Out Portland 2020! |

| Service Area | Bureau Name | Decision Package Title | Package Description | Funded in | Year Funded: | Package Funding | Package FTE | Package Status | Package Update |
|-----------------------|-------------------------------------|---|--|---------------------------|--------------|-----------------|-------------|----------------|---|
| Community Development | Bureau of Planning & Sustainability | convert limited-term to regular positions | BPS is requesting the positions funded by Metro, Solid Waste Management Fund, General Fund, and BDS IAA to be converted from Limited Term to Regular/Permanent positions. These positions have been funded by these resources for 3+ years and expect the funding to be continued in future years. | FY 2017-18 Fall BMP | FY 2017-18 | - | - | Complete | Limited-Term positions are converted to Regular thru P4 except one which BPS is working with BHR to convert the position from LT to Regular and determine the appropriate classification. |
| Community Development | Bureau of Planning & Sustainability | End of Metro Funds | This cut reflects the conclusion of Metro grant funding for BPS planning projects addressing multi-dwelling code and the Powell-Division transit corridor. This cut affects the bureau's ability to complete the Better Housing by Design and Powell-Division transit corridor projects. These projects were initiated with Metro grant funds which will be exhausted before project completion. | FY 2017-18 Adopted Budget | FY 2017-18 | (61,806) | (0.50) | Complete | This cut reflects the conclusion of Metro grant funding for BPS planning projects addressing multi-dwelling code and the Powell-Division transit corridor. |
| Community Development | Bureau of Planning & Sustainability | FY 2016-17 Carryover: Beach Access | The City completed its planned work on the Eastbank Riverfront Plan and the Central City Potential Swimming Beach Sites Study (Swimming Study) in fall 2016. The final Eastbank Riverfront Plan (March 2017) recommends a riverfront that includes habitat restoration with compatible public recreation enhancements including a swimming beach and a dock. The Swimming Study researched river swimming programs elsewhere to help develop site and safety criteria that were used to evaluate and rank five potential beach site locations in the Central City. Both of these plans are currently scheduled for City Council hearings on May 31, 2017, and acceptance by resolution. This work has generated considerable interest in creating pop up beaches in summer 2017 and 2018 and perhaps future years. We also anticipate that there may be even more work identified at, or following, the May 31 hearing. Therefore, we request program carry over of \$13,000. The bureau will present the final Eastbank Riverfront Plan and Central City Potential Swimming Beach Sites Study to Council in May 2017. It is expected that this hearing will result in further planning workload for the bureau, and interest has been expressed in creating "pop up beaches" in Summer 2017 and beyond. At this time, the immediate resources required by BPS are not clear, and expenses related to implementing these sites will likely fall primarily to other bureaus. CBO recommends the carryover request, but given the uncertainty around expenses, suggests this issue be revisited in the Fall supplemental budget to make any necessary realignments between | FY 2017-18 Adopted Budget | FY 2017-18 | 13,000 | | Complete | Project will be presented to City Council September 2018. |
| Community Development | Bureau of Planning & Sustainability | FY 2016-17 Carryover: Floodplain Regulation | In 2016, NOAA Fisheries issued a biological opinion that concluded that development in the floodplain jeopardizes the continued existence of salmon, steelhead and other species listed as threatened or endangered under the Endangered Species Act. FEMA is responsible for addressing the issues raised in the biological opinion and providing direction to local communities on how to regulate development in the floodplain. FEMA indicated that guidance will likely not be ready until 2018. The bureau carried over approximately \$16,000 from FY 2015-16 in the Fall supplemental budget for a contract related to this project. The Federal Emergency Management Agency (FEMA) has signaled that it will not release local guidance for regulating floodplain development until 2018. Accordingly, the bureau has requested to carry over the remaining \$10,000 to the next fiscal year, which CBO recommends. | FY 2017-18 Adopted Budget | FY 2017-18 | 10,000 | | In Progress | In 2016, NOAA Fisheries issued a biological opinion that concluded that development in the floodplain jeopardizes the continued existence of salmon, steelhead and other species listed as threatened or endangered under the Endangered Species Act. The Federal Emergency Management Agency (FEMA) is responsible for addressing the issues raised in the biological opinion and providing direction to local communities on how to regulate development in the floodplain. On March 5, 2018, FEMA released a summary of their proposed implementation strategy for a one-month review period. Once they receive and consider comments, the implementation strategy will undergo National Environmental Policy Act (NEPA) review. Once that process is complete they will issue their final guidance for regulating floodplain development. BPS expects to need to use these funds in 2019 to prepare for an anticipated compliance date of approximately January 2020. |
| Community Development | Bureau of Planning & Sustainability | FY 2016-17 Carryover: Historic Resource Inventor | In process of contracting consultant (Convergence Architecture - MWBE). The project timeline takes them through August 31, 2017, so we expect to carryover \$15,000 to FY 2017-18. The bureau is in the process of contracting out the final project work, to be completed in Summer 2017. BPS does not expect to encumber these funds before the end of the fiscal year. CBO recommends carrying over the remaining funds (\$15,000) into FY 2017-18 to complete the project. | FY 2017-18 Adopted Budget | FY 2017-18 | 15,000 | | Complete | The Carry Over funds are being used to pilot the methodology for the HRI developed in the first part of the project. 9/18 UPDATE FY 2016-17 Carryover: Historic Resource Inventory COMPLETE Carryover funds were used to update parts of the citywide Historic Resource Inventory (HRI). BPS technology services staff created a new historic resources database and existing HRI records were imported into a searchable online database for use by the public and surveyors in the field. With the remaining funds, BPS purchased two iPads, a MacBook Pro, and a Nikon Coolpix camera to provide the technology needed for staff and volunteers to survey historic resources in the field. |
| Community Development | Bureau of Planning & Sustainability | FY 2016-17 Carryover: Off-Road Cycling | BPS anticipates that the final consultant work for ~\$15k will take place in July and August 2017. In the FY 2016-17 Fall supplemental budget, the bureau received an additional \$40,000 in one-time resources for an extended public process around this project. The bureau requests to carry forward the remaining \$15,000 for the final consultant work to take place in Summer 2017, which CBO recommends. | FY 2017-18 Adopted Budget | FY 2017-18 | 15,000 | | In Progress | Recommendations will be presented to City Council in September. 9/18 UPDATE: FY 2016-17 Carryover: Off-Road Cycling Off-Road Cycling Master Plan IN PROGRESS (there are two line items in the spreadsheet) Off-Road Cycling Master Plan published Draft Recommendation in Oct 2017 for public comment through events and online comment and surveys. Project Advisory Committee provided comments on the draft. Parks Board provided comments on the draft in April 2018. BPS will make revisions to recommendations based on comments then forward Off-Road Cycling Master Plan to City Council in early 2019. |
| Community Development | Bureau of Planning & Sustainability | Home Energy Scores | The requirement that all houses listed for sale in Portland have Home Energy Scores takes effect January 1, 2018. To ensure that this requirement does not create barriers for low-income sellers, Council directed BPS to establish a mechanism to assist those sellers. Until the requirement takes effect, it is difficult to estimate the possible volume of sellers who will request assistance; the funding requested here is a conservative estimate that we believe is more than sufficient and should provide ample assurance to Council and stakeholders that these resources are available if necessary. | FY 2017-18 Fall BMP | FY 2017-18 | 150,000 | | In Progress | Enhabit has exited the market and is no longer conducting Home Energy Score business, so Contract has been closed out. Those funds are available to go back into SWMF. Given that Community Energy Project is providing all of the service to low-income home sellers, BPS requests \$15,000 for the remainder of the fiscal year, under Contract No. 31001191, DPO No. 22229774. |
| Community Development | Bureau of Planning & Sustainability | Housing | This Decision Package will allow BPS to initiate or complete three projects that address aspects of the current housing crisis and the ability to meet Portland's long-range housing needs. The three projects are: 1. Complete the Residential Infill Project (\$387k, one-time GF) 2. Complete the Better Housing by Design Project (\$197k, one-time GF) 3. Initiate the SW Corridor Equitable Housing Strategy (\$172k, on-going GF) 1. Complete Residential Infill Project This project responds to the housing emergency and to community concerns about the scale of in-fill housing in single-dwelling zones. The project is designed to result in additional smaller housing options in single family neighborhoods. In December 2016 City Council directed BPS to develop code and map amendments that implement the recommendations in the Concept Report with amendments. BPS has begun this work, which will take 18 months to complete. The work plan includes development of zoning code and map amendments, an extensive public review process, and a formal legislative process involving the Planning and Sustainability Commission and City Council. 2. Complete the "Better Housing by Design" (BHBD) Project The Better Housing by Design project will revise development and design standards for Portland's multi-dwelling residential zones outside the Central City. Between now and 2035, 80% of Portland's housing growth will be in multi-family buildings and other compact housing types. A large portion of this new housing will be located in Portland's multi-dwelling zones. The Better Housing by Design project is updating Zoning Code, street connectivity and other regulations to ensure new construction better meets the needs of | FY 2017-18 Adopted Budget | FY 2017-18 | 584,350 | 3.50 | In Progress | 1. Residential Infill Project (\$387k, one-time GF) will be at City Council for adoption December 2018. 9/18 UPDATE: This is a multi-year/multi-phased project. This project did not receive one-time GF funding in FY17-18. Instead, Council directed BDS to fund it. The BDS funds are being used to complete phases III and IV of this project. The project is still in progress. Completed Phases: Phase I of the project ended with City Council adoption of a resolution in December 2016. Phase II of the project included drafting a proposal and conducting extensive public outreach in Fall 2017. Current phase: Phase III is devoted to staff revised the proposal and the Planning and Sustainability Commission holding hearings and making a recommendation. We are currently in this phase and expect a PSC recommendation in the Fall 2018. Final phase: Phase IV consists of the City Council hearings and decision. This is anticipated in Spring/Summer 2019. 2. Complete the Better Housing by Design Project (\$197k, one-time GF) will be at City Council for approval in Dec 2018. 9/18 UPDATE: Published the Better Housing by Design Concept Report on July 3, 2017. Published the Discussion Draft on January 23, 2018. In response to public comment, published the Proposed Draft on May 11, 2018. Briefed the PSC on the Proposed Draft on May 22, 2018, and held a public hearing on June 12, 2018. PSC will deliberate on recommendations in Fall 2018, with recommendations going to City Council in Spring 2019. 3. SW Corridor. This decision package was cut to exclude the \$172k SW Corridor scope (\$584k was approved of the requested \$757k). As a result, this money was not used for the SW Corridor Housing |
| Community Development | Bureau of Planning & Sustainability | Ongoing General Fund Reduction | This cut eliminates funds for contracts that provide analysis of transportation, economic, and environmental issues related to code amendments. It also cuts part of a Management Analyst position that has provided demographic and housing analysis. Without these contracts and position, policymakers will have less information on which to base their decisions and the City may be more vulnerable to appeal. | FY 2017-18 Adopted Budget | FY 2017-18 | (81,038) | (0.25) | Complete | This cut eliminated funds for contracts to analyze transportation, economic, and environmental issues related to code amendments. The bureau has been able to partially off-set this through savings in other programs and reprogramming of grant funds. |
| Community Development | Bureau of Planning & Sustainability | Planning & Smart Cities carryover | Request GF carryover to • reprogram 1-time salary savings to cover analysis contracts for implementation of projects to increase housing supply and options and advance equitable development in East Portland, \$200,000 • complete the Portland Urban Data | FY 2017-18 Spring BMP | FY 2017-18 | (268,500) | | In Progress | Funds are allocated and encumbered in contracts for professional services to support several projects. |
| Community Development | Bureau of Planning & Sustainability | Public Trash and Energy Score carryover | Public Trash and Energy Score Carryover, funded by SWMF • Request carryover to fund committed Public Trash Can contracts, \$337,500 • Request carryover to fund committed Home Energy Score contracts, \$75,000 | FY 2017-18 Spring BMP | FY 2017-18 | | | In Progress | Public Trash: Collection services are now provided in 9 districts by three different contracted haulers. All of the current contracts expire on March 31, 2019. BPS will determine whether to extend the existing contracts with an inflationary price adjustment, as has typically occurred, or if we will adjust any of the collection district boundaries and / or establish new contracts via a competitive process that also considers other program goals, e.g. improving equity amongst haulers in this line of work. Energy Score: Given that Community Energy Project is providing all of the service to low-income home sellers, BPS requests \$15,000 for the remainder of the fiscal year, under Contract No. 31001191, DPO No. 22229774. |
| Community Development | Bureau of Planning & Sustainability | reallocate budget between major expenses | To reallocate budget appropriations between major expense categories. • Request \$50,000 for grant to Zero Net Cities project and reduce personnel services, funded by Grant \$200,000. • Reduce EMS by \$70,000 and increase personnel services to support the Mandatory Food Scrap Rollout, funded by SWMF. • Reallocate \$40,000 in Personnel Services (due to delays in hiring) to Consultants for the Smart Cities project, funded by GF. | FY 2017-18 Fall BMP | FY 2017-18 | - | | In Progress | Zero Net Cities: City Council approved the Zero Net Cities grant agreement on May 9, 2018. Funds were spent and the project is being managed by Vinh Mason, a current City employee. Food Scraps (move to complete): Money fully spent on position, project work continues using existing 18/19 budget. Smart Cities: As a result of delay, and a decision to extend the pilots from 6 months to 1 year to give us time to more thoroughly test and evaluate the Funding for the Portland Urban Data Lake (PUDL) pilot platforms, we are asking to carryover \$68,500 of BPS Smart Cities Program funds to FY18/19 to be able to fully scope and fund a year long pilot, and to allow sufficient time for contract negotiations with the various vendors involved in the project. |
| Community Development | Bureau of Planning & Sustainability | Smart Cities | Emerging technologies are creating new ways to use the wealth of urban data to inform key policy decisions, improve delivery of city services, and address city goals. Transportation, equity, public health, economic opportunity, community engagement and carbon emissions are all areas in which we can anticipate improvements through leveraging urban data. Multiple bureaus, including the Bureau of Planning and Sustainability, Transportation, and Technology Services, the City Budget Office, the Office of Community Technology and PDC have been involved in initial "smart city" projects applying emerging technologies to long-standing city priorities. Private-sector firms, ranging from large tech firms to local startups, have approached the city about potential partnerships, and Portland State University is actively developing opportunities connected to city functions and priorities. Urban data and emerging technologies are currently being applied to serve city needs in a range of application areas including green infrastructure, transportation, disaster preparedness, public Wi-Fi, human services, and commercial and residential energy. City staff participate in a wide variety of national smart city initiatives, including the MetroLab Network, Transportation for America, the Global City Team Challenge, and Bloomberg's What Works Cities. To coordinate effectively across bureaus and build partnerships among public, private, and academic institutions requires dedicated staffing. This Decision Package will help coordinate and manage citywide, cross-agency smart cities strategy and projects. The two requested positions will enable the city to make the most of our existing partnerships, build on work already done by BPS, PBOT and others, and ensure the long-term sustainability of | FY 2017-18 Adopted Budget | FY 2017-18 | 236,039 | 2.00 | In Progress | This Decision Package supports management of a citywide, cross-agency smart cities strategy and projects. The funding supports two new positions will enable the city to make the most of our existing partnerships, build on work already done by BPS, PBOT and others, and ensure the long-term sustainability of related projects. These two, new regular management analyst positions have been filled. So far the project has: • Established a shared vision, strategic priorities and implementation projects for the city in partnership with PBOT, CBO, BTS and other internal and external agencies. • Established 3-5 regional smart cities priorities through participation in the Regional Smart Cities Action Plan, a regional effort led by PSU. • An adopted open data policy, open data program and system of governance. • Coordinate at least three pilot projects in partnership with other bureaus. Pilot projects already underway are a network of connected, low-cost air quality sensors, the deployment of ~300 AT&T Spotlight Node sensors on street lights in East Portland. Both are in coordination with PBOT, BTS, PSU and others. |
| Community Development | Bureau of Planning & Sustainability | Complete Single-Dwelling Development Code Project | In FY15-16, the bureau started a project to respond to three issues related to recent concerns about the scale of in-fill housing in single-dwelling zones. This often is from infill development that involves demolition of existing houses or development on previously undeveloped lots created by property line adjustments and historically platted narrow/small lots. When begun, the project was intended to be complete in the first quarter of 2017. The project has now been broken into two phases. Phase One will be complete by December 2016 and will include adoption of code changes related to Topic #1 above. Phase Two will be complete by December 2017 and will cover the other two Topics. | FY 2016-17 Adopted Budget | FY 2016-17 | 361,380 | 2.40 | Complete | Update 9/4/18 Residential Infill Project – This is a multi-year/multi-phased project. The funds reported here were used to complete Phases I and II of this project. Completed Phases: Phase I of the project ended with City Council adoption of a resolution in December 2016. Phase II of the project included drafting a proposal and conducting extensive public outreach in Fall 2017. Current phase: Phase III is devoted to staff revised the proposal and the Planning and Sustainability Commission holding hearings and making a recommendation. We are currently in this phase and expect a PSC recommendation in the Fall 2018. Final phase: Phase IV consists of the City Council hearings and decision. This is anticipated in Spring/Summer 2019. Three contracts have been funded by this package and all are encumbered and spent. The services provided were for facilitation services (Envirostruss), urban design services (DECA Architects), and economic analysis (Johnson Economics). |

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|-----------------------|-------------------------------------|---|--|---------------------------|------------|------------|------|-------------|---|
| Community Development | Bureau of Planning & Sustainability | Public Trash Can Expansion | BPS currently provides public place garbage collection for 600 garbage cans in seven business districts at an annual cost of about \$400,000. This decision package would extend public place garbage collection to 24 additional business districts throughout the city. In FY16-17, service would expand to five new areas, with a similar phased expansion in each of the following four years. The total expansion will add approximately 825 additional garbage cans in 24 new service districts. | FY 2016-17 Adopted Budget | FY 2016-17 | 380,020 | 1.00 | In Progress | We have established contracts with commercial haulers to provide collections services in two new districts: Alberta Main Street, and the Pearl District area of downtown. We have conducted outreach and community engagement in areas throughout East Portland and have identified over 200 potential sites for new garbage cans. We have also worked with community groups in different neighborhoods to create locally generated artwork for new cans. There have been unanticipated issues that have delayed our expansion into new East Portland areas. For example, we are still waiting for Procurement Services to execute a contract allowing us to purchase new garbage cans. Also, until very recently, we were awaiting clarification from PBOT about their encroachment policy, which determines where new cans are allowed to be placed. We believe these issues are being resolved and that future delays of these types can be avoided. We expect to install new cans throughout East Portland by the end of FY 2018-19. BPS has also been active in improving service in the downtown collection district. We passed an Ordinance establishing a partnership with Downtown Clean & Safe to replace older style cans within the core downtown area with the new style unit. 100 cans will be replaced by new ones, purchased by Clean & Safe, by the end of calendar year 2018. An additional 100 additional new cans will be installed by the end of the FY; some replacing other older styles and others increasing the total number of cans in the downtown core. BPS plans on increasing the number of cans within the Pearl District by the end of the calendar year in order to enhance service in this part of downtown. We also plan on increasing the frequency of collection throughout the downtown collection zone by the time the current collection contract expires on March 31, 2019. |
| Community Development | Bureau of Planning & Sustainability | Completion of New Comprehensive Plan | City Council adopted the new 2035 Comprehensive Plan in December 2016, including land use map, capital project list and supporting documents. This package was submitted to the State Department of Land Conservation and Development. Also later in FY16-17, City Council is expected to approve the first set of code and zoning map changes needed to implement the new Comprehensive Plan. With submittal of these deliverables, the City will have completed its submissions to satisfy State Periodic Review requirements. | FY 2016-17 Adopted Budget | FY 2016-17 | 175,664 | 0.55 | Complete | The new Comprehensive Plan is complete. In December 2016 a package of early implementation actions (primarily zoning code and map changes) was also adopted. BPS staff are now working with DLCD to ensure the plan is acknowledged by the state, and working with BDS to train staff in the new plan and regulations. The adopted plan goes into effect on January 1, 2018. The new Comprehensive Plan is complete. In December 2016 a package of early implementation actions (primarily zoning code and map changes) was also adopted. The adopted plan and related code changes went into effect in May of 2018. The plan was appealed to the state Land Conservation and Development Commission in late 2017, and LCDC ruled in the City's favor in March of 2018. |
| Community Development | Bureau of Planning & Sustainability | IAA w/ BUREAUS | To appropriate bureau to bureau IAA's for services provided by BPS. Services include DOZA with BDS, Mapping Application and Street Car Analysis with PBOT, and Business Outreach with Water. | FY 2016-17 Fall BMP | FY 2016-17 | 211,002 | 0.33 | Complete | UPDATE 9/18 DOZA with BDS: \$184,002. (Change status to "COMPLETE") The Design Overlay Zone Assessment (DOZA) was a joint BPS-BDS project. BDS provided BPS with \$150,000 to hire a consultant to assess the City's Design Overlay Zone. The consultant was hired in FY15-16, but the majority of the work was conducted in FY16-17. The remainder of the carryover was for staff time to coordinate between the bureaus, manage the consultant, interface with the Design Commission, the Planning and Sustainability Commission, and the public. The Assessment was complete and draft recommendations were presented to the Commissions and the public in January 2017. The consultant's final recommendations were presented to City Council in April 2017. Staff spent the rest of last fiscal year (May-June 2017) developing a workplan with BDS to implement the recommendations. The funds were spent by May 2017. Streetcar analysis with PBOT. This work supported PBOT and Portland Streetcar Inc analysis of possible system expansions. The work related to this IAA was completed in FY 16/17. |
| Community Development | Bureau of Planning & Sustainability | OFF-ROAD CYCLING | Off Road Cycling project is proving to be more complex and taking more time to work through issues with Bureau staff and Project Advisory Committee (and eventually public). Schedule is expected to extend to June 2017. BPS has some funds in reserve that could cover any needed additional technical consultant work, but we need additional funds for facilitation of 3-4 additional Project Advisory Committee meetings and a half-time CSA to support the public engagement process. | FY 2016-17 Fall BMP | FY 2016-17 | 40,000 | | In Progress | The funding was used for facilitation of 4 additional Project Advisory Committee meetings to formulate recommendations (\$20,000) and a half-time CSA to support public outreach process (\$20,000). BPS hired a CSA and held two community events and four open houses in April to review draft opportunity sites and a conceptual system plan. Over 500 Portlanders attended an event or open house. BPS also created an online open house, including an interactive map and questionnaire, which received over 2,500 comments. BPS also met with individual community groups and worked with the City's Community Engagement Liaison Program and the Community Cycling Center to engage traditionally underrepresented communities to comment on these opportunities. The Project Advisory Committee will meet in September and October to help BPS finalize the recommendations to City Council due January 2018. |
| Community Development | Bureau of Planning & Sustainability | Bureau to Bureau IAA | Request bureau to bureau IAA. • \$10,000 to PBOT to provide Central Eastside Freight Access and Circulation Impact Assessment Study. • \$32,300 to PBOT to survey three sample top of bank sites along the Willamette River to compare and align the automated LIDAR mapping method with an on-the-ground mapping protocol used by Portland Bureau of Transportation (PBOT) survey crews. • \$10,000 to PBOT to support a Regional Smart Cities Implementation Plan in coordination with PSU, TriMet, and others. PBOT is providing funding to PSU for the City's share of the costs, and BPS will contribute \$10k to supplement PBOT's own resources for this. • Additional \$3,500 to ONI from \$7,811 to \$11,311 to support the Neighborhood Cleanup efforts. | FY 2016-17 Spring BMP | FY 2016-17 | 20,000 | | Complete | Projects are included in the FY2017-18 Fall BUMP. • \$10,000 to PBOT to provide Central Eastside Freight Access and Circulation Impact Assessment Study. • \$29,790 to PBOT to survey three sample top of bank sites along the Willamette River to compare and align the automated LIDAR mapping method with an on-the-ground mapping protocol used by Portland Bureau of Transportation (PBOT) survey crews. • \$10,000 to PBOT to support a Regional Smart Cities Implementation Plan in coordination with PSU, TriMet, and others. PBOT is providing funding to PSU for the City's share of the costs, and BPS will contribute \$10k to supplement PBOT's own resources for this. |
| Community Development | Bureau of Planning & Sustainability | Deconstruction Incentive | \$4K w/ BDS to sponsor landlord trainings, provided by BDS | FY 2015-16 Fall BMP | FY 2015-16 | \$ 50,000 | | Complete | All of the \$50,000 in incentives were paid out to support a total of 25 deconstruction projects. This concludes the incentive program. |
| Community Development | Bureau of Planning & Sustainability | FY 2014-15 Carryover: Off-Road Cycling | The Off-Road Cycling Plan project will develop a citywide master plan for mountain biking trails and facilities. The plan will provide a vision for the system, assess community needs, evaluate site feasibility, and identify recommendations for the future | FY 2015-16 Adopted Budget | FY 2015-16 | \$ 300,000 | | In Progress | The Portland Off-road Cycling Master Plan project will develop a citywide plan for a system of off-road cycling facilities for a variety of users, including children, adults and families. The project is led by BPS in collaboration with Portland Parks & Recreation, the Bureau of Environmental Services, Bureau of Transportation, the Portland Water Bureau and other local government and community partners. The project publish recommendations for public comment in Fall 2017, with City Council consideration in Fall 2018/Winter 2019. |
| Community Development | Bureau of Planning & Sustainability | Completion of Central City Plan update - CC2035 | The bureau will receive \$284,200 of General Fund one-time resources to add 2.0 FTEs to the team working to complete the update of the Central City Plan by the end of FY 2015-16. This includes completion of the policy plan as well as implementing code updates. The add package also funds consultant analysis to analyze feasibility and options for the alignment and design of the Green Loop. | FY 2015-16 Adopted Budget | FY 2015-16 | \$ 284,200 | 2.00 | Complete | The project schedule was delayed due to the PHB's Inclusionary Zoning project. Central City code re: bonuses was dependent on the final decisions re: IZ. Changes were made based on the IZ project to the CC2035 Plan Proposed Draft. After two public hearings in July and August 2016 and 9 worksessions from September 2016-May 2017, the Planning and Sustainability Commission voted to recommend the CC2035 Plan to City Council for final adoption. Current schedule has the CC2035 Plan Recommended Draft before City Council at public hearings in September 2017. Then City Council worksessions with staff on public testimony in the fall and early winter will lead to City Council amendments and final action on the Plan. UPDATE 9/18: The CC2035 plan and code went into effect May 2018. |

Bureau of Planning & Sustainability

Performance Measures

| Performance Measure | Type | FY 2015-16 Year-End Actuals | FY 2016-17 Year-End Actuals | FY 2017-18 Adopted Budget | FY 2017-18 Year-End Actuals | FY 2018-19 Adopted Budget |
|---|------------|-----------------------------------|-----------------------------------|---------------------------------|-----------------------------------|---------------------------------|
| PN_0014 - Percentage of significant natural resources protected through non-regulatory and/or regulatory measures | OUTCOME | 82% | 83% | 83% | 84% | 83% |
| PN_0020 - Percentage of new housing units in the four-county region that are within the City of Portland | KPM | 37% | 48% | 40% | 40% | 41% |
| PN_0021 - Percentage of Portlanders living in complete neighborhoods | KPM | 63% | 65% | 65% | 64% | 67% |
| PN_0022 - Percentage of waste recycled or composted | KPM | 64% | 63% | 65% | 54% | 65% |
| SD_0001 - Percentage of residential material diverted from wastestream | OUTCOME | 63% | 62% | 64% | 62% | 64% |
| SD_0002 - Percentage of commercial material diverted from wastestream | OUTCOME | 64% | 63% | 65% | 52% | 65% |
| SD_0003 - Number of residents reached by sustainability training and outreach | WORKLOAD | 193,464 | 203,232 | 204,000 | 212,655 | 215,000 |
| SD_0007 - Value of grants and contracts awarded | WORKLOAD | \$951,990 | \$1,763,144 | \$1,500,000 | \$1,510,017 | \$1,500,000 |
| SD_0008 - Percentage reduction in per person carbon emissions from 1990 levels | KPM | 41% | 41% | 42% | 41% | 41% |
| SD_0014 - Pounds of solid waste generated per household | WORKLOAD | 802 | 814 | 780 | 800 | 800 |
| SD_0015 - Tons of solid waste generated by businesses | WORKLOAD | 257,748 | 288,402 | 255,000 | 332,600 | 280,000 |
| SD_0016 - Typical residential garbage and recycling monthly bill | EFFICIENCY | \$29.15 | \$29.25 | \$29.15 | \$29.25 | \$30.00 |
| SD_0019 - Number of businesses reached by sustainability outreach and training | WORKLOAD | 2,313 | 2,736 | 2,850 | 4,097 | 4,000 |
| SD_0020 - Number of multifamily units provided with waste reduction assistance | WORKLOAD | 21,300 | 16,035 | 25,000 | 10,516 | 25,000 |
| SD_0023 - Number of development projects provided with green building assistance | WORKLOAD | 4 | 5 | 6 | 8 | 6 |
| SD_0025 - Per capita residential energy use (million BTUs) | OUTPUT | 26.70 | 26.00 | 26.00 | 24.40 | 26.00 |
| SD_0026 - Number of certified green buildings in Portland | OUTPUT | 2,573 | 2,766 | 2,800 | 2,872 | 2,900 |
| SD_0027 - Utility savings to City from energy- and water-efficiency projects and waste and toxics reduction (million dollars) | OUTCOME | \$7.66 | \$7.70 | \$6.35 | \$7.22 | \$6.50 |
| SD_0028 - Percentage of City electricity use from renewable resources | OUTPUT | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| SD_0036 - Number of residents participating in the Fix-it Fairs | WORKLOAD | 1,223 | 814 | 1,300 | 1,600 | 1,300 |
| SD_0037 - Cost per-Fix-It Fair workshop participant | EFFICIENCY | \$87.73 | \$73.15 | \$71.00 | \$75.00 | \$90.00 |
| SD_0041 - Number of residential and commercial solar energy systems installed in Portland since 2006 | OUTPUT | 3,748 | 4,200 | 4,300 | 6,000 | 4,400 |

Performance Measure Variance Descriptions

Bureau of Planning & Sustainability

Performance Measures

| Performance Measure | Type | FY 2015-16 Year-End Actuals | FY 2016-17 Year-End Actuals | FY 2017-18 Year-End Actuals | FY 2018-19 Adopted Budget | Narrative | Graph Description |
|---|------------|-----------------------------------|-----------------------------------|-----------------------------------|---------------------------------|--|--|
| PN_0014 - Percentage of significant natural resources protected through non-regulatory and/or regulatory measures | OUTCOME | 82% | 83% | 84% | 84% | | The calculation includes all waters in the city (Willamette, Columbia, wetland, etc.) and high- and medium-value resources in environmental zones (C, P and V zones) and River Environmental zone (CC2035). Protected resources in the Greenway overlay zones include the following: General (g) overlay (outside South Waterfront) – 25 ft from Ordinary High Water (OHW) General (g) overlay (within South Waterfront) – 100 ft from OHW Natural (n), & Recreation (r) overlays – 25 ft from OHW , Water Quality (q) overlay – 100 ft from OHW, Industrial (i) overlay – not protected |
| PN_0020 - Percentage of new housing units in the four-county region that are within the City of Portland | KPM | 37% | 48% | 40% | 41% | Portland continues to exceed regional expectations for its share of household growth. | Share of new housing units in four-county region that are in Portland: Using data from Construction Monitor, data on all new housing units completed are totaled for the four-county region and for Portland alone. The dataset geocoded for better accuracy. |
| PN_0021 - Percentage of Portlanders living in complete neighborhoods | KPM | 63% | 65% | 64% | 67% | The growth and the adoption of new zoning codes to implement the new 2035 Comprehensive Plan are expected to begin an increase the number of households in existing Complete Neighborhoods and increase the area of the city with Complete Neighborhood characteristics. | Share of households in a Complete Neighborhoods: The number and location of new housing units built are mapped and added to a 2010 baseline estimate. GIS analysis is used to calculate the change of percentage of households inside and outside areas categorized as Complete Neighborhoods. The output of the Complete Neighborhoods analysis is a geography of "completeness" based on 7 factors of a healthy, connected city. |
| PN_0022 - Percentage of waste recycled or composted | KPM | 64% | 63% | 54% | 65% | Many factors, including a booming construction industry and poor recycling markets that result in marginal paper and plastics heading to the landfill, have combined to bring Portland's recovery rate to its lowest in a decade. Haulers reported collecting 11,000 tons more garbage and 20,000 tons less recycling from businesses. The recycling rate also includes recycling collected by entities other than permitted haulers, which dropped by 24 percent between 2015 and 2016 (BPS receives the independent recycler data from Oregon DEQ and it lags one year behind BPS data). The DEQ allocated 32,000 fewer tons of wood waste, 20,000 fewer tons of scrap metal, 19,000 fewer tons of cardboard, 7,000 fewer tons of paper, and 1,200 fewer tons of container glass to Portland in 2016 compared to 2015. Finally, Portland identified a double-counting error in its recycling rate calculation that also contributed to a lower result than anticipated. Portland continues to reach out to residents and businesses to ensure Portland's recycling is clean and marketable, work with regional and state partners and work to find new markets for materials Portlanders want and expect to recycle. | This measure compares the tons of waste from both residents and commercial organizations that is recycled and composted versus landfilled. It combines both reported and estimated components and is a proxy for the success of the City's recycling and composting efforts. The higher the number, the more waste is recycled and composted and/or the less is landfilled. Despite BPS efforts, there are many confounding factors, including the state of the economy, especially the construction industry, recycling markets, and even the weather (wetter years result in heavier compost). |
| SD_0001 - Percentage of residential material diverted from wastestream | OUTCOME | 63% | 62% | 62% | 64% | Portland residents continue to do a great job recycling and composting. | This measure compares the tons of waste from residents in single family homes and small plexes that is recycled and composted versus landfilled. It combines both reported and estimated components and is a proxy for the success of the City's recycling and composting efforts. The higher the number, the more waste is recycled and composted and/or the less is landfilled. Despite BPS efforts, there are many confounding factors, including the state of the economy and even the weather (wetter years result in heavier compost). |
| SD_0002 - Percentage of commercial material diverted from wastestream | OUTCOME | 64% | 63% | 52% | 65% | Many factors, including a booming construction industry and poor recycling markets that result in marginal paper and plastics heading to the landfill, have combined to bring Portland's recovery rate to its lowest in a decade. Haulers reported collecting 40,000 tons more garbage and 20,000 tons less recycling from businesses. Additionally Portland identified a double-counting error in its recycling rate calculation that also contributed to a lower result than anticipated. Portland continues to work with businesses to promote and encourage recycling and composting and ensure recycling is clean and marketable. | This measure compares the tons of waste from multifamily properties and commercial organizations that is recycled and composted versus landfilled. It combines both reported and estimated components and is a proxy for the success of the City's recycling and composting efforts. The higher the number, the more waste is recycled and composted and/or the less is landfilled. Despite BPS efforts, there are many confounding factors, including the state of the economy, especially the construction industry, recycling markets, and even the weather (wetter years result in heavier compost). |
| SD_0003 - Number of residents reached by sustainability training and outreach | WORKLOAD | 193,464 | 203,232 | 212,655 | 215,000 | BPS has several major program offerings that reach residents (currently Curbsider newsletter, Home Energy Score, green building assistance, Master Recycler Program, Resourceful PDX, Bright Spot and Be Cart Smart). The Bureau's percent focus on implementing the Home Energy Score program has increased the number of annual contacts by 7,000. | This measure counts community engagement efforts lead by BPS's various program offerings. |
| SD_0007 - Value of grants and contracts awarded | WORKLOAD | \$951,990 | \$1,763,144 | \$1,510,017 | \$1,500,000 | Anticipated grants, IGA, and IAA revenues received or actual collection. | Anticipated grants, IGA, and IAA revenues received or actual collection. |
| SD_0008 - Percentage reduction in per person carbon emissions from 1990 levels | KPM | 41% | 41% | 41% | 43% | Per person carbon emissions continue to decline in Portland, although not as quickly as required to reach emission reduction goals. For the first time since 2007 total transportation sector emissions have climbed above 1990 levels, a result of population growth and more drivers on the road. BPS will continue to work with Portland Bureau of Transportation to implement the climate action plan and the City's 100% renewables goal to reduce total emissions with a renewed focus on active transportation, renewable fuels, and fleet electrification. | This measure counts the percentage change in tons of carbon emissions per person compared to the 1990 baseline levels. These emissions are calculated annually based on international protocols for conducting sector-based carbon emissions inventories. |
| SD_0014 - Pounds of solid waste generated per household | WORKLOAD | 802 | 814 | 800 | 800 | After dropping from over 1,000 pounds per household prior to the move to every-other-week garbage in 2011, this measure continues to hold steady. | This measure shows pounds of garbage collected curbside from single family and small plex customers divided by the total number of subscribed customer households. The measure is intended to be a proxy for BPS' waste reduction efforts and dropped substantially following the switch to every-other-week garbage collection. |
| SD_0015 - Tons of solid waste generated by businesses | WORKLOAD | 257,748 | 288,402 | 332,600 | 280,000 | Haulers report collecting over 40,000 tons more garbage from businesses than last year. | This measure shows tons of solid waste collected from Portland businesses, non-governmental organizations, and multifamily properties (five or more units on a taxlot). The measure is intended as a proxy for BPS' success at waste reduction efforts but also rises and falls based on the state of the economy, particularly the construction industry. |
| SD_0016 - Typical residential garbage and recycling monthly bill | EFFICIENCY | \$29.15 | \$29.25 | \$29.25 | \$30.00 | Prices for recycled paper and plastic dropped due to changes in overseas markets. | This measure is the adopted rate for collection of the most common garbage service level at a single family home (35-gallon garbage roll cart collected every other week and weekly recycling/composting). The rates are set to cover the anticipated costs of providing the service and allow franchised haulers the opportunity to realize a target operating margin. |
| SD_0019 - Number of businesses reached by sustainability outreach and training | WORKLOAD | 2,313 | 2,736 | 4,097 | 4,000 | BPS has several major program offerings that reach businesses (currently Sustainability at Work, Home Energy Score, Green Building and Commercial Building Energy Reporting). The Bureau's recent focus on implementing the Home Energy Score Program and Commercial Building Energy Reporting has increased the number of annual contacts by 1,500. | This measure count businesses engagement efforts lead by BPS's various program offerings. |
| SD_0020 - Number of multifamily units provided with waste reduction assistance | WORKLOAD | 21,300 | 16,035 | 10,516 | 25,000 | Current engagement efforts continue not to deliver on program goal of assisting 25,000 multifamily units annually. FY 18-19 BPS will develop a new plan for reaching climate, equity and quality service goals for this sector. | This measure counts multifamily residents reached by BPS's multifamily waste reduction program. |
| SD_0023 - Number of development projects provided with green building assistance | WORKLOAD | 4 | 5 | 8 | 6 | Eight buildings have been provided with green building assistance, which typically includes technical assistance as well as providing developers with resources and contacts to assist their efforts. | This measure counts the number of development projects that have been provided with green building assistance. |
| SD_0025 - Per capita residential energy use (million BTUs) | OUTPUT | 26.70 | 26.00 | 24.40 | 23.00 | Residential energy use per person is 21.9, which is 30% below 1990 levels. While trends for residential energy use are down, total use increased from 2015-2016 by 2%. More work is needed to improve energy efficiency in the residential sector to continue reducing residential energy use per person. | This measure counts the energy use, per person, in Portland homes, in million BTUs (British Thermal Units). |
| SD_0026 - Number of certified green buildings in Portland | OUTPUT | 2,573 | 2,766 | 2,872 | 2,900 | The number of certified green buildings in Portland continues to grow through a combination of policies, incentives, industry best practices and market demand. | This measure counts the number of buildings in Portland that have received green building certification. |
| SD_0027 - Utility savings to City from energy- and water-efficiency projects and waste and toxics reduction (million dollars) | OUTCOME | \$7.66 | \$7.70 | \$7.22 | \$6.50 | The City Energy Challenge program tracks cumulative efficiency project cost savings over time. It is a measure of accrued savings from past projects and first-year savings from projects implemented in the current FY. | This measure counts the millions of dollars saved annually from various energy, water, waste and other resource efficiency efforts in the operations of the City buildings and infrastructure. |
| SD_0028 - Percentage of City electricity use from renewable resources | OUTPUT | 100.0% | 100.0% | 100.0% | 100.0% | The City generates about nine percent of its electricity use from onsite renewables such as solar and biogas. Of the remaining utility-purchased electricity, fifteen percent comes from clean energy resources as mandated by the state. The City purchases Renewable Energy Credits (RECs) for the remaining amount of electricity consumption. | This measure counts the amount of electricity used by City operations that comes from renewables sources. This measure includes both the renewable energy purchased directly from the utilities, as well as the renewable energy produced on-site from biogas at the wastewater treatment plant and various solar arrays. |
| SD_0036 - Number of residents participating in the Fix-it Fairs | WORKLOAD | 1,223 | 814 | 1,600 | 1,300 | The Fix-It Fairs continue to be a popular, well attended winter-time events that happens in three locations throughout Portland. | This measure is a count of the total attendees to all of the Fairs held for the season. Usually this includes three Fairs and three different locations. |
| SD_0037 - Cost per-Fix-It Fair participant | EFFICIENCY | \$87.73 | \$73.15 | \$75.00 | \$90.00 | Cost per Fix-It Fair participants includes the coordinators time and material and services budget. Fix It Fair participants get access to informational exhibits, hourly workshops, free professional child care and lunch. | This measure includes the Fix-it Fair's coordinators salary and materials and services budget. Biggest impact on this measure are the number of annual Fair attendees and salary of the coordinator. |
| SD_0041 - Number of residential and commercial solar energy systems installed in Portland since 2006 | OUTPUT | 3,748 | 4,200 | 5,647 | 6,000 | The number of solar energy systems installed in Portland continue to climb. 2017 was a particularly robust year due to the a rush of installs ahead of the ending of the State RETC program. | This measure counts the number of solar energy systems installed since 2006 on both homes and commercial buildings. |

Performance Measure Variance Descriptions

| PO No. & Line | Vendor No. | Vendor Name | CO Number | CO Name | Fund No. | Bus Area | Funds Centers No. | Commitment Item No. | Functional Area No. | Grant No. | Pur Grp | Buyer | Matri Grp No. & Name | Remaining Encumbrance | Accrual JE Number | Accrual Actual Invoice | Accrual Estimated Amount | Fall BMP Encumbrance Carryover |
|-----------------|------------|---------------------------------|--------------|-------------------------------|----------|----------|-------------------|---------------------|---------------------|--------------|---------|--------------|---------------------------|-----------------------|-------------------|------------------------|--------------------------|--------------------------------|
| 22215520 - 0020 | 116726 | Mayer Reed Inc | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDAPCC00000000GC | Not Relevant | P99 | ATOKU | 91800 Consulting Services | 12,500.00 | N/A | | | |
| 22215760 - 0020 | 105376 | Community Alliance Of Tenants | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 529000 | CDAPDI00000000GC | Not Relevant | X99 | ATOKU | GRA Grant Agreement | 8,185.00 | N/A | | | |
| 22216602 - 0010 | 100915 | Latte No Sugar Co | PNDO000001 | Director's Office | 100000 | PN00 | PNDO000001 | 529100 | CDASDO00000000GC | Not Relevant | X99 | TSCHULTZ | 91500 Communications Svcs | 4,802.59 | 2200007228 | | 1,800.00 | |
| 22217689 - 0010 | 105757 | Portland Development Commission | PN00600001 | Metro: Powell-division - Bhcc | 217007 | PN00 | PNCP000001 | 521100 | CDCPCM00000000GC | PN000060 | X99 | TSCHULTZ | IGA Inter-gov Agreement | 156,160.24 | N/A | | | |
| 22229585 - 0010 | 112408 | Clean Energy Works Inc | 8PNCE0000002 | Hes Low-income Program | 605000 | PN00 | PNSD000002 | 521100 | CDTSC000000000GC | Not Relevant | P99 | QLE | 91800 Consulting Services | 73,074.00 | N/A | | | |
| 22229774 - 0010 | 100192 | Community Energy Project Inc | 8PNCE0000002 | Hes Low-income Program | 605000 | PN00 | PNSD000002 | 521100 | CDTSC000000000GC | Not Relevant | P99 | QLE | 91800 Consulting Services | 72,120.00 | N/A | | | |
| 22231665 - 0010 | 109745 | Barney & Worth Inc | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDAPCC00000000GC | Not Relevant | P99 | QLE | 91800 Consulting Services | 32,500.00 | N/A | | | |
| 22231665 - 0020 | 109745 | Barney & Worth Inc | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDAPEN00000000GC | Not Relevant | P99 | QLE | 91800 Consulting Services | 11,047.70 | N/A | | | |
| 22235630 - 0010 | 119943 | Jonathan Palmer | PNSD000004 | Sust.educate&assist | 605000 | PN00 | PNSD000004 | 521100 | CDTEBU00000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 14,000.00 | N/A | | | |
| 22235986 - 0010 | 100662 | Housing Development Center Inc | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 529001 | CDCPCM00000000GC | Not Relevant | X99 | AWILLIAM | BHCD Bhcd Contracts | 62,519.00 | N/A | | | |
| 22236717 - 0010 | 114636 | Flowing Solutions Lic | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDAPEN00000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 3,500.00 | N/A | | | |
| 22236723 - 0010 | 110164 | Fregonese Associates Inc | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDAPCC00000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 30,000.00 | N/A | | | |
| 22237082 - 0010 | 101294 | Eco Northwest | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDCPPR00000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 10,000.00 | N/A | | | |
| 22237083 - 0010 | 114636 | Flowing Solutions Lic | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDPN000000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 15,000.00 | N/A | | | 10,942.00 |
| 22237089 - 0010 | 119856 | Desiree Williams-rajee | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDPN000000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 2,500.00 | N/A | | | |
| 22237090 - 0010 | 110389 | Angelo Planning Group Inc | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDCPUD00000000GC | Not Relevant | P99 | AMENDOZACALD | 91800 Consulting Services | 38,500.00 | N/A | | | |
| 22238040 - 0010 | 101298 | Metro | PNCP000001 | Planning&urban Desig | 100000 | PN00 | PNCP000001 | 521100 | CDPN000000000GC | Not Relevant | X99 | AMENDOZACALD | IGA Inter-gov Agreement | 20,000.00 | N/A | | | |
| 22238175 - 0010 | 119856 | Desiree Williams-rajee | PN00740001 | Drive Oregon -sensors Project | 217007 | PN00 | PNOP000002 | 521100 | CDTSEG00000000GC | PN000074 | P99 | AMENDOZACALD | 91800 Consulting Services | 4,495.00 | N/A | | | |
| 22238458 - 0010 | 119708 | Jeremy Hays | PN00740001 | Drive Oregon -sensors Project | 217007 | PN00 | PNOP000002 | 521100 | CDTSEG00000000GC | PN000074 | P99 | AMENDOZACALD | 91800 Consulting Services | 4,977.50 | N/A | | | |
| 22239068 - 0010 | 119520 | Carri Munn | PNSD000001 | Communications | 100000 | PN00 | PNSD000001 | 521100 | CDTECO00000000GC | Not Relevant | P99 | QLE | 91800 Consulting Services | 2,200.00 | 2200007350 | 2,200.00 | | |
| Total | | | | | | | | | | | | | | | | 2,200.00 | 5,467.00 | 10,942.00 |