



Bureau of Planning and Sustainability

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M E M O

April 20, 2020

To: City Budget Office

From: Andrea Durbin, Director

Subject: Spring BMP — Bureau of Planning and Sustainability

With this memo, I am conveying the FY 2019-20 Spring BMP submittal for the Bureau of Planning and Sustainability, the Solid Waste Management Fund, the Community Solar Fund, and the Portland Clean Energy Community Benefits Fund.

As per the Mayor's instructions to reduce non-essential spending during the current COVID-19 emergency, the bureau has suspended travel for all staff at least through the end of this fiscal year. Additionally, we are freezing all hires aside from the Equity Manager position, for which we are completing the interview process and expect to have a new hire in place at the beginning of FY 2020-21.

BPS' add requests for this Spring BMP include:

- \$100,000 through program carryover to continue the Age Friendly City project. The focus of this work has pivoted to directly support Portland's COVID-10 response. This funding directly supports our Age Friendly Project Coordinator, who is the project lead for the Aging and Disability Community Project at the Emergency Command Center.
- \$146,000 through savings from the Equity Manager position, which has been vacant for all of FY 2019-20. These funds will support our newly formed Equity Program to provide bureau-wide guidance on policy development and implementation. This resource is more critical than ever for the bureau to meet City equity goals and Mayor Wheeler's budget directive to center equity in our work.
- \$114,000 in Grants and bureau-to-bureau interagency revenues to be added in FY 2019-20.

We are also making technical adjustments amounting to \$200,000 to appropriately resources existing essential programs.

Thank you.



PN - Bureau of Planning & Sustainability DP Type Technical Adjustments

Request Name: 9828 -Technical Adjustments_

Package Description

- Allocate P&D budget to grants, PCEF and other programs
- Adjustment for Floodplain Management IA overhead
- Adjustment for PCEF overhead
- Add BDS IA for PCEF to identify and evaluate codes and processes, and provide education opportunities
- Increase PBOT IA amount for Public Trash Can program
- Reallocate salary savings in Business Services to fund additional contract work
- Reallocate salary to contracts for Anti- Displacement and add project code

Service Impacts

N/A

Equity Impacts

N/A

Account Name	2019-20 SPRING Requested Adj
Expense	
External Materials and Services	46,638
Internal Materials and Services	98,362
Personnel	-145,000
Expense	Sum: 0

Account Name	2019-20 SPRING Requested Adj
Revenue	
General Fund Discretionary	0
Revenue	Sum: 0

PN - Bureau of Planning & Sustainability DP Type New Revenue

Request Name: 9873 -Decision Package_Grants

Package Description

- Additional Grants Fund Awarded for FY19-20
- TR000281 Burnside Bridge Earthquake ready \$3,624
 - PN000083 Metro Recycle FY19-20 – Additional award amount \$22,153
 - PN000058 Washington County Master Recycle – Additional funding amount \$250

Service Impacts

N/A

Equity Impacts

N/A

Account Name	2019-20 SPRING Requested Adj
Expense Internal Materials and Services	1,074
Personnel	24,953
Expense Sum:	26,027

Account Name	2019-20 SPRING Requested Adj
Revenue Intergovernmental	26,027
Revenue Sum:	26,027

PN - Bureau of Planning & Sustainability DP Type New Revenue

Request Name: 9874 -Decision Package_IAA

Package Description

- PBOT IA for Equity Analysis \$33,011 - Project is canceled due to personnel turnover.
- BDS IA for Online Permitting System \$28,000 - This is additional 25% funding for Business System Analyst to assist with testing and improving A7 system, training and documentation.
- BDS IA for Floodplain Management Update \$24,010 - This fund is to complete regulatory, administrative and engagement work needed to advance the Floodplain Management Update Program work plan.
- BES IA for Floodplain Management Update \$24,010 - This fund is to complete regulatory, administrative and engagement work needed to advance the Floodplain Management Update Program work plan.
- Housing IA for Preference Policy \$2,000 - This fund is for GIS Web Developer to develop and host Preference Policy web application.
- PBOT IA for Transportation Modeling \$10,000

Service Impacts

N/A

Equity Impacts

N/A

Account Name	2019-20 SPRING Requested Adj
Expense External Materials and Services	10,000
Personnel	45,009
Expense Sum:	55,009

Account Name	2019-20 SPRING Requested Adj
Revenue Interagency Revenue	55,009
Revenue Sum:	55,009

PN - Bureau of Planning & Sustainability DP Type GF Program Carryover

Request Name: 9960 -Age Friendly Carryover

Package Description

In 2019, City Council funded an Age-Friendly Program within BPS as a one-time add package. This carryforward is a request to continue that work as intended in that add, given that the bureau was only able to hire the project coordinator mid-year.

Because Portland is becoming increasingly diverse and markedly older, these demographic trends require the City to better understand the intersections between race and age as well considering sociodemographic factors such disability, geography, income, and more. To advance our city's age friendliness, we must advance the 2035 Comprehensive Plan and the Action Plan for an Age-Friendly Portland, while addressing racial equity, reducing disparities, engaging with and advancing opportunities for under-served and under-represented communities, and co-creating the City's plans, policies and programs.

In addition to the existing work plan, the Age-Friendly Cities Program has pivoted its focus to respond to the COVID-19 crisis. The Age-Friendly Cities program manager was asked by the ECC's incident commander and ECC Coordination Section chief to stand up a new project focused on aging and disability — now called the Aging and Disability Community Project (ADCP). The ADCP's mission is to catalog best practices, develop, and implement approaches in response to COVID-19 related to older adults and people with disabilities.

Service Impacts

Age-friendly community development is always ongoing as there is no designation or certification; rather, the City of Portland has committed to moving toward age friendliness indefinitely. An age-friendly community is asset-based, seeks to address causes of inequities, and requires understanding the evolving experiences related to age and ability. The following work program highlights actions intended to move Portland toward becoming more age friendly end of FY 2020-21:

1. Advance Portland's age friendliness by advancing existing City efforts:
 - Produce report detailing how age-friendly policies from Portland's 2035 Comprehensive Plan are being implemented related to equity, housing, community involvement, housing, transportation, and urban form and design.
 - Consult with BPS and other bureaus on existing programs and services to add value and advance age-friendly approaches and outcomes (e.g., Disability Equity Task Force, anti-displacement, Electric Vehicle Zoning Project, East Portland Action Plan, Joint Office of Homeless Services, Fix-it Fair, corridor and center plans).
2. Improve age-friendly intergenerational community engagement:
 - Build on existing internal and external engagement efforts to advance age- and ability-related community involvement/engagement including but not limited to: Sunday Parkways, AARP Neighbor Walks, BPS' Community Involvement Committee, outreach with communities of color (e.g., Black Parent Initiative, Metropolitan Family Service's Experience Corps, AARP's northeast chapter).

Equity Impacts

A key component of the Age-Friendly Program is to increase awareness and outcomes related to the intersection of race, age, and disability. The program has begun the development of partnerships across bureaus and external partners to advance age-friendly approaches and outcomes in East Portland (e.g., anti-displacement, childcare, urban heat islands, mobility, physical accessibility, intergenerational programs, Children's Levy). Fundamental to this work is to ensure there is understanding of intersections between race, age, (dis)ability, income, housing, and displacement so that policies and programs can more holistically address disparities across our most vulnerable communities.

Account Name	2019-20 SPRING Requested Adj
Expense	-15,000
External Materials and Services	-15,000
Personnel	-85,000
Expense	Sum: -100,000

Account Name	2019-20 SPRING Requested Adj
Revenue	-100,000
General Fund Discretionary	-100,000
Revenue	Sum: -100,000

PN - Bureau of Planning & Sustainability

DP Type

GF Program Carryover

Request Name: 9962 -Equity Carryover

Package Description

The Equity Program Decision Package continues to reflect the bureau’s commitment to advancing racial equity internally and externally to benefit Indigenous people, Black people, immigrants and refugees, and people of color. BPS has been without an Equity Manager for most of FY 2019-20, which allowed new bureau leadership to work with staff and external partners on developing a new strategy for implementing the bureau’s racial equity plan and meeting the City’s equity goals. Several initiatives were reshaped and simultaneously BPS staff began the process of aligning our workplans and long-term strategies to meet the needs of our communities.

Under direction from new Director Andrea Durbin, the salary savings from the vacant Equity Manager position were left untouched, with the expectation that the resources would be reprogrammed once the new manager was onboard. This carryforward request is designed to fully operationalize our bureau’s commitment to Equity. Along with the Equity Manager hire (expected in June 2020), BPS has also reassigned two existing staff to make up a new Equity Program for BPS. This team will be responsible for programming the resource in next Fiscal Year.

Service Impacts

Starting with the 2035 Comprehensive Plan and the 2015 Climate Action Plan, BPS has been asking important questions about how our programs measure impacts to our frontline communities and communities of color before enacting new policies and initiatives. As we realign resources to better answer those questions, bureau programs continue to invest in resources to better engage and co-create with community partners to ensure community priorities and bureau priorities better align. And while the bureau has an existing Racial Equity Plan, there is much still to be learned internally and with our partners to accelerate this work. This carryforward resource would go a long way in delivering the changes that BPS seeks to make to address inequities across Portland. The carryforward would support the follow projects as well as additional programming as guided by the new Equity Manager.

1. The launch BPS Equity Team. This group will be led by an Equity Manager who reports directly to the bureau Director and has two direct reports, one focused on external efforts and one focused on internal efforts. This team will lead equity training for managers and pro-blackness trainings for all bureau staff.
2. Implementation of BPS’s Racial Equity Plan. BPS’s plan is ambitious, but implementation needs to be further resourced. The equity team will provide a much needed lens on policy and program development, including providing additional support to under funded projects.
3. Climate Justice. Our frontline communities, including Portland’s Black, Indigenous, and communities of color, are being hit first and worst by the impacts of the climate crisis. Portland’s youth will be facing the consequences of today’s decisions for the rest of their lives. BPS is realigning staff priorities and resources to center community and provide meaningful engagement and co-creation. The work of the Equity Team contributes to the next Climate Action Plan and will send clear direction that it is no longer acceptable to simply name the inequities and injustice, but that our climate work must prevent burden and address past harm.
4. COVID-19 Recovery. As the City’s long-term planning bureau, land use, climate and development strategies will be critical to Portland’s recovery from the COVID-19 emergency. Having an Equity Manager appropriately supported and resourced will be an invaluable addition to the team participating in planning to build back better.

Equity Impacts

This carryforward request sits at the center of the BPS’ equity work for FY 2020-21. While many projects currently incorporate equity in development, we know more can be done. From resourcing community partners, providing critical data analysis and research to ensuring our community engagement is culturally competent and relevant, this resource can make a substantial difference in BPS’ ability to lead with equity.

Account Name		2019-20 SPRING Requested Adj
Expense	Personnel	-146,000
Expense	Sum:	-146,000

Account Name		2019-20 SPRING Requested Adj
Revenue	General Fund Discretionary	-146,000
Revenue	Sum:	-146,000

PN - Bureau of Planning & Sustainability DP Type Contingency

Request Name: 10007 -PCEF Inter-Fund Loan Payment

Package Description

Adjust budget appropriation in PCEF and SWMF Funds to address interfund loan payment from PCEF to SWMF.

- Budget interfund loan remittances in PCEF Fund by reducing fund contingency
- Budget interfund loan proceeds in SWMF Fund and increase fund contingency

Service Impacts

Equity Impacts

Account Name	2019-20 SPRING Requested Adj
Expense	Contingency 0
	Debt Service 2,253,075
Expense	Sum: 2,253,075

Account Name	2019-20 SPRING Requested Adj
Revenue	Bond & Note Proceeds 2,253,075
Revenue	Sum: 2,253,075

Business Area Projection Report

Bureau of Planning & Sustainability - Fund 100

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
External Materials and Services	1,224,395	484,902	1,130,000	92%
Internal Materials and Services	254,532	199,551	250,000	98%
Personnel	9,220,517	6,963,065	9,157,000	99%
Sum:	10,699,444	7,647,518	10,537,000	98%

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
General Fund Discretionary	8,864,719	0	8,788,816	99%
General Fund Overhead	762,776	0	762,776	100%
Interagency Revenue	1,071,949	798,532	978,908	91%
Miscellaneous	0	6,458	6,500	#DIV/0
Sum:	10,699,444	804,989	10,537,000	98%

Revenue Discussion

BPS requests carryover of approximately \$246,000 from the General Fund discretionary resource to continue the Age Friendly Program and to advance the bureau's equity programming. In addition, the bureau to bureau interagency forecast shows about \$93,000 in IAA revenue that BPS won't bill mainly due to position vacancies and hiring freeze since March 2020.

Revenue Risks

Expenditure Discussion

BPS requests about \$246,000 in one-time General Fund thru program carryover to continue the Age Friendly Program and the bureau's Equity programming in FY 2020-21. BPS anticipates additional savings from furloughs which aren't included in the forecast. As per the Mayor's instructions to reduce non-essential spending during the current COVID-19 emergency, the bureau has suspended travel for all staff at least through the end of this fiscal year. Additionally, we are freezing all hires aside from the Equity Manager position, for which we are starting the interview process and expect to have a new hire in place at the beginning of FY 2020-21.

Expenditure Risks

Other Notes

Business Area Projection Report

Bureau of Planning & Sustainability - Fund 217

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
External Materials and Services	1,068,397	366,623	600,621	56%
Internal Materials and Services	25,387	21,619	24,864	98%
Personnel	1,239,289	815,849	1,056,328	85%
Sum:	2,333,073	1,204,090	1,681,813	72%

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Intergovernmental	2,333,073	1,084,276	1,681,813	72%
Sum:	2,333,073	1,084,276	1,681,813	72%

Revenue Discussion

All grants ending in FY 2019-20 will be fully spent except those that are multi-year grants, for which the remaining balance will be carried over into FY 2020-21 through the Fall BuMP.

Revenue Risks

Expenditure Discussion

The variances are due to continuation of Metro and other grant projects. The remaining balances of these multi-year grants will be requested to be carried over into FY 2020-21 thru Fall BuMP.

Expenditure Risks

Other Notes

Business Area Projection Report

Bureau of Planning & Sustainability - Fund 224

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Ending Fund Balance	84,413	0	92,350	109%
Sum:	84,413	0	92,350	109%

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Beginning Fund Balance	73,332	0	83,689	114%
Fund Transfers - Revenue	9	0	0	
Miscellaneous	11,072	6,738	8,661	78%
Sum:	84,413	6,738	92,350	109%

Revenue Discussion

The Community Solar Fund accounts for expenses and revenues associated with the installation of solar electric systems on community buildings. The accrued revenue is used to install new, small-scale solar electric systems on community building. The fund receives revenue from the electric utility companies, in the form of a 15-year stream of incentive payments based on the energy produced from each solar energy system.

Revenue Risks

Expenditure Discussion

Expenditure Risks

Other Notes

Business Area Projection Report

Bureau of Planning & Sustainability - Fund 229

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Contingency	14,129,594	0	14,562,669	103%
Debt Service	2,253,075	0	1,820,000	81%
Ending Fund Balance	40,000,000	0	40,000,000	100%
External Materials and Services	798,500	67,586	555,000	70%
Internal Materials and Services	236,721	18,361	236,721	100%
Personnel	1,217,854	650,629	989,000	81%
Sum:	58,635,744	736,576	58,163,390	99%

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Beginning Fund Balance	6,382,669	0	6,382,669	100%
Bond & Note Proceeds	2,253,075	0	1,780,721	79%
Miscellaneous	0	-5,401	0	
Taxes	50,000,000	28,464,256	50,000,000	100%
Sum:	58,635,744	28,458,855	58,163,390	99%

Revenue Discussion

The Portland Clean Energy Community Benefits Initiative is the result of Ballot Measure 26-201 that was passed by Portland voters in November 2018. The Portland Clean Energy Community Benefits Fund represents an estimated \$44 million to \$66 million in new annual revenue for clean energy and clean energy jobs in Portland, with a focus on benefitting low-income residents and communities of color. The initiative will provide grants from the fund to qualified nonprofit organizations carrying out programs to deliver on the goals of the measure.

BPS requested an interfund loan from the Solid Waste Management Fund for \$2.3 million to support the initial phase of program implementation in FY 2018-19 and FY 2019-20. All reasonably-necessary program-related expenses covered by the Solid Waste Management Fund in FY 2018-19 and FY 2019-20 will be reimbursed from the Portland Clean Energy Fund in FY 2019-20.

Revenue Risks

Expenditure Discussion

Personal services will be underspent due to delays in hiring and the recent hiring freeze. In addition, there is a budget of \$140,000 for other BPS staff time to be billed to PCEF which no hour has been billed. Materials and Services were underspent as program is still in its early stage and contracting is taking longer than anticipated. Program is planning to spend about \$200,000 in application assistances grants which are pre-awards before the full application cycle in FY 2020-21. The Portland Clean Energy Fund will be paying back the Solid Waste Management Fund for the loan borrowed in FY 2018-19 and FY 2019-20, about \$1.8 million in FY 2019-20.

Expenditure Risks

Other Notes

Business Area Projection Report

Bureau of Planning & Sustainability - Fund 605

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Contingency	2,479,670	0	0	
Debt Service	2,329,893	7,959	1,780,721	76%
Ending Fund Balance	805,727	0	5,741,879	713%
External Materials and Services	3,096,220	649,135	2,396,000	77%
Fund Transfers - Expense	1,180,283	1,069,331	1,180,283	100%
Internal Materials and Services	1,713,840	1,102,874	1,559,463	91%
Personnel	2,724,482	1,946,667	2,701,427	99%
Sum:	14,330,115	4,775,967	15,359,773	107%

Major Object	2019-20 SPRING Requested Total	2019-20 March Actuals YTD	2019-20 SPRING Projection	% Projected Actuals to Requested Total
Beginning Fund Balance	4,510,534	0	5,985,275	133%
Bond & Note Proceeds	2,253,075	0	1,820,000	81%
Charges for Services	4,121,057	2,027,111	4,121,057	100%
Interagency Revenue	5,000	2,500	5,000	100%
Licenses & Permits	3,323,996	1,663,876	3,323,996	100%
Miscellaneous	116,453	85,559	104,445	90%
Sum:	14,330,115	3,779,046	15,359,773	107%

Revenue Discussion

BPS collected residential franchise and commercial tonnage fees as planned through December 13, 2019 and has projected to fully collect the revenues through June 30, 2020. The Portland Clean Energy Fund is paying back the Solid Waste Management Fund for the loan borrowed in FY 2018-19 and FY 2019-20, about \$1.8 million in FY 2019-20.

Revenue Risks

There are significant impacts from the COVID-19 health emergency anticipated for BPS solid waste revenues. BPS will have more details to report in Fall.

Expenditure Discussion

BPS anticipates spending most of its Personal Service budget. Materials and Services will likely be spent or committed, except about \$700,000 in the Public Trash Cans Program, mainly due to delays in contracting.

Expenditure Risks

Other Notes