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Introduction: Program Offer Budgets

Beginning in FY 2019-20, City of Portland bureaus developed and presented their budgets in a "program offer" format. Program offers combine program descriptions, budget, and performance data for a set of services into a brief and concise document. The goal of program offer budgeting is to clearly and succinctly describe how bureau resources are allocated to achieve goals and deliver services to the community.

This new format represented a significant change for many bureaus; requiring new ways of thinking about how budgets were developed and how this information is shared with the community. The City expects that it will take 1-2 additional budget cycles for all bureaus to produce these documents in a robust and comprehensive yet succinct manner to maximize the value of this format. For this year, the City focused on providing a clear and concise program descriptions for each program so that the public can easily understand how resources are aligned to achieve service goals. In future budget cycles, we will be looking to improve performance data and available financial data associated with each program, and home in on the precise qualitative information that is most relevant for each program.

Program offer descriptions are compiled into the newly created Volume III – Program Offer Budgets as part of the City's FY 2019-20 Adopted Budget documents. This volume is meant to serve as a reference document of the comprehensive suite of services and programs the City provides. In addition, Volume I and II provides interested parties with Citywide summaries financial overviews and bureau-by-bureau goals, key issues capital plans, and budgets; and Volume II provides fund descriptions and a look at the City's finances by fund.

What is in a Program Offer?

Generally, a program is a series of activities intended to achieve a goal or service objective. A program may be supported by multiple organizational units to achieve this goal.
A program offer should provide Council and the public with an explanation of what we do as government by concisely summarizing key program information. Program offers should contextualize the many decisions that go into building bureau budgets and clearly address the following questions:

- What are the goals of each individual program?
- How are specific activities, and the program, structured to accomplish those goals? Why is this work important?
- How are communities differently impacted by programs?

- What are the levels of service the public should expect to see given the bureau's allocated resources towards that program?
- What are the resources allocated to that effort?

There are five primary sections of the program offer descriptions: (1) program description and goals, (2) explanation of services, (3) equity impacts of the program, (4) changes to the program, and (5) program budget.

In total, there are 263 programs in the City across 27 bureaus. In addition to learning about the Cities budget via Volume III, readers may also want to interact with to the City's Adopted Budget dashboard at portlandoregon.gov/budget to learn more about how City resources are deployed. Please send any feedback to CBO.

Section One: Program Description and Goals

This section describes the key goals of a program, using performance measures and other data to quantify the effectiveness. Highlighting performance trends and key outcomes is recommended. Questions considered when preparing this narrative include:

- What are the key performance trends of the program? Have results changed from previous years? How do results compare to strategic targets?
- What data indicates that this program is successful?
- How does this program support the bureau's five-year Racial Equity Plan and other bureau equity goals related to racial and disability equity?

In addition to the program descriptions discussed above, program offers will also include a table of annual performance measure data. A primary focus of the program offers is communicating the quantifiable outcomes to Council and the public via performance measures. For the first year, many programs do not yet have performance measures. Over the long-term, the goal is that each program should be associated with multiple measures, including at least one outcome measure, but achieving this level of performance measurement may take several years.

Section Two: Explanation of Services

This section explains why this program exists and why it is important, focusing specifically on how resources and activities are used to achieve program goals:

- **Defining the context.** Which problem exists that demands a City of Portland service? Why is this particular service in demand from Portlanders and customers?
- **Description of activities.** This section explains how the program activities are intended create positive impact or address an identified issue or problem. Why is this program best suited to address this need? What are the direct results of program activities? How much work is required for these results?
- **Program results.** This section explains how program results (or "outputs") impact the intended audience. In what ways is the intended audience better off as a result of the

program activities? How much better off is the intended audience (relative to if the program did not exist)? Why are the outcomes important?

- **Community engagement.** In what ways are community members, particularly people from communities of color and people with disabilities, involved in determining the bullet points above? Have any changes been made as a result?

Section Three: Equity Impacts

This section describes how programs benefit and/or burden communities, specifically communities of color and persons with disabilities. Moreover, this subsection clarifies how resources could be reallocated within the base budget in order to achieve more equitable outcomes.

Considerations may include:

- **Equity in service levels and outcomes.** Does the bureau track disaggregated quantitative data or collect qualitative information about how communities of color and people with disabilities access and experience services?
- **Accommodations.** As applicable, please note how this program will meet the requirements of ADA (Americans with Disabilities Act) Title II and Civil Rights Title VI?
- **Impact of changes.** If there are changes noted in the section below, how/do these changes (positively or negatively) impact the community? Is this impact different (positively or negatively) for communities of color or people with disabilities?

Section Four: Changes to Program

This section describes how a program is being impacted due to changes in external factors, the environment, and increases or decreases in resources/staffing.

- **Changes due to external factors.** How have the external factors or environment in which the program operates changed since the prior year? How has the demand for program services changed?
- **Changes to resources.** How has the reallocation of bureau resources to the program changed as compared to prior years? If this program has been impacted by the 1% constraint requirement or as a result of other significant internal reallocations, this section should describe the change in resources, the reasoning for this change, and the expected impact.
- **Changes to organizational structure.** In what ways has organizational structure or activities of the program changed over the past year? What are staff doing differently to achieve their goals?

Section Five: Program Budget

This section describes the program budget and key fiscal constraints according to the following areas:

- **Resources:** Within the 'Program Budget' section, this 'Resources' subsection describes the primary resources that support the program (e.g. General Fund discretionary, user fees, interagency revenues), the sustainability of the resources, and prior

year/forecasted trends in the resources. If this program receives funding from rates or user fees, how does the current/proposed structure impact different populations' abilities to access services?

- **Expenses:** This subsection describes the primary expenses of the program, including which types of expenses are fixed, predicable, and necessary as compared to expenses where there is greater discretion. Bureaus should identify the greatest expenses and those expenses which are most critical to delivering program services.
- **Staffing:** This subsection briefly describes how many staff members are associated with program and the general role of these staff members. This section should also briefly discuss staffing trends. How has staffing changed over the past five years? What are the forecasted staffing needs?
- **Assets and Liabilities:** This subsection identifies the key assets that are owned and/or operated by program, the current condition of the assets, and a summary of the financial plan for repair, renewal and replacement.

Administration and Support

Program Description & Goals

The Business Operations office manages the finance (forecasting, budget, accounts payable, accounts receivable, procurement), payroll/timekeeping, research, facilities, equity and human resource maintenance functions for the Bureau of Emergency Communications.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Business Operations office supports the bureau with processes which are unique compared to other City bureaus. This is due to the nature of operating a 24/7 emergency dispatch 9-1-1 center.

Equity Impacts

The Business Operations Manager also serves as the equity manager. This position is in charge of Development of Equity Lens and Racial Equity plan for the bureau

Changes to Program

The Business Operations office plans to develop a capital master plan to address current and future growth needs. It will also lead efforts in developing a Racial Equity Plan for the bureau.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	16,000
Personnel	0	5,012	0	734,014
Fund Expense				
Debt Service	0	0	0	0
Sum:	**0**	**5,012**	**0**	**750,014**
FTE	0	0	0	6

Resources: Partner agencies throughout Multnomah County, research fees and City of Portland General Fund

Expenses: Personnel services and general contracts

Staffing: Director, Business Operations Manager, Financial Analyst II, Administrative Specialist II (2), Office Specialist III (2)

Assets and Liabilities:

Program Information

Bureau:	Bureau of Emergency Communications	**Program Contact:**	Keren Ceballos
Website:	https://www.portlandoregon.gov/911/	**Contact Phone**	503-823-0911

9-1-1 Operations

Program Description & Goals

Emergency Communications provides 24/7 service to the residents, visitors, and emergency response agencies throughout Multnomah County. The bureau's 9-1-1 and public safety dispatch operation is supported by several program areas: Technology Systems Support, Analytics, Training and Development, Quality Assurance and Accountability, Emergency Management, and Business Operations. Emergency Communications strives to ensure all data and performance measures are clearly defined, understood and accurately reported. The bureau's strategic plan includes initiatives that focus on adequate staffing to meet national performance standards, ensuring timely and accurate call triage, leveraging technology, and developing employee skills. Emergency Communications aggressively recruits and hires new trainees and continually strives to improve the training program.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of emergency 9-1-1 telephone calls	522,947	527,027	529,000	530,513	0
Total number of nonemergency telephone calls	315,022	337,773	337,000	357,928	0
Percentage of emergency 9-1-1 calls answered within 20 seconds	0	64%	69%	70%	95%
Average time to answer emergency 9-1-1 calls (in seconds)	25	25	21	14	0
Number of overtime hours	24,650	17,627	21,000	19,750	0
Total number of text sessions	1,817	1,526	1,100	1,672	0
Percentage of emergency 9-1-1 calls answered within 10 seconds in the busy hour	22%	16%	26%	53%	90%
Total operational sick leave hours taken	14,070	14,517	12,850	14,955	0
Total number of forced overtime hours	3,302	2,296	2,800	2,432	0
Percentage of overtime hours attributed to emergency communications operations	90%	90%	85%	90%	0
Average time to answer emegency 9-1-1 cell phone calls (in seconds)	31.50	29.96	29.00	14.00	0
Average time to answer emergency 9-1-1 landline calls (in seconds)	10.65	11.95	10.00	14.00	0
Number of operations employees hired in academy	0	22	0	9	0
Number of operations employees graduating from academy	0	26	0	18	0
Total number of Certified Call Takers by Fiscal Year to take 9-1-1/Non-Emergency calls	0	101	0	118	0
Total number of Certified Police Dispatchers by Fiscal Year to take 9-1-1/Non-Emergency calls and dispatch police responders	0	84	0	118	0
Total number of Sr. Dispatchers by Fiscal Year to take 9-1-1/Non-Emergency calls and dispatch police, fire and medical responders	0	75	0	100	0
Total number of calls for service (Police, Fire, and Medical for all partner agencies)	0	602,474	0	621,221	0

Explanation of Services

Emergency Communications maintains the drive to meet and exceed national performance standards. The bureau continues to train dispatchers at a record pace, and after more than a decade of understaffing, nearly all budgeted positions are filled. This is a significant accomplishment considering that 9-1-1 centers across the nation are struggling to find 9-1-1 operators. While improved staffing benefits Emergency Communications and our community, there has been a direct impact on facility overcrowding.

Equity Impacts

The budget includes funds that will support employee equity, hiring, retention and inclusion for communities of color and people with disabilities. Recruitment efforts are designed to expand employment opportunities for diverse populations with the goal of creating a more inclusive workforce.

Changes to Program

Emergency Communications will be implementing a new call triage program, which will greatly enhance service delivery to the community and our user agencies. This new program integrates medical, fire, and police triage questions into the Computer Aided Dispatch system, which will provide consistent information for responders, and save time per emergency call.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,231,258	1,052,970	1,554,457	426,721
Internal Materials and Services	5,071,878	4,886,632	4,633,497	4,922,973
Personnel	15,288,365	16,398,861	17,636,849	16,711,882
Fund Expense				
Contingency	0	0	333,572	0
Debt Service	1,407,693	249,221	271,083	287,549
Fund Transfers - Expense	1,019,929	1,536,019	1,026,653	959,138
Ending Fund Balance	1,587,046	1,122,832	0	
Sum:	**25,606,171**	**25,246,535**	**25,456,111**	**23,308,263**
FTE	169	186.75	188	147

Resources: State 9-1-1 Tax, partner agencies throughout Multnomah County, City of Portland General Fund

Expenses: Personnel and required technology systems

Staffing: 9-1-1 Emergency Communications Dispatchers - 123, other staff - 35

Assets and Liabilities:

Program Information

Bureau:	Bureau of Emergency Communications	**Program Contact:**	Bob Cozzie
Website:	https://www.portlandoregon.gov/911/	**Contact Phone**	503-823-0911

Technology Systems

Program Description & Goals

The Technology Systems Support office oversees the technology applications and systems used by the Bureau of Emergency Communications. The two most critical systems supported by the office are the Computer Aided Dispatch system and the Vesta 9-1-1 phone system used to receive and process emergency, and non-emergency calls for service.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Emergency Communications has made some significant technology upgrades in the past fiscal year which have improved the work process for emergency communications call takers and dispatchers. In July 2018 the Vesta 9-1-1 cell phone filter was adjusted so that if there was an available call taker a cell phone would be immediately delivered for answering without first having to go through a filtering process to verify the intent of the call, saving time the caller is on hold.

Equity Impacts

9-1-1 is accessible to all community

Changes to Program

In January 2019 the Computer Aided Dispatch system was upgraded which brought several improvements that allows the call takers and dispatchers to do their job more efficiently. In FY 19/20, the Technology Systems Support office will be instrumental in implementing the Integrated Priority Dispatch System.
For the past decade, Emergency Communications has relied on a technology that filtered out accidental 9-1-1 calls from cell phones. Over the past year, the bureau recognized that the use of this technology resulted in lengthy call waiting times for callers. As a result, the technology is no longer in use and performance measures are trending in a positive direction.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	1,600,000	1,600,000
External Materials and Services	0	0	0	765,862
Personnel	0	0	0	814,064
Sum:	**0**	**0**	**1,600,000**	**3,179,926**
FTE	0	0	0	2

Resources: Partner agencies throughout Multnomah County, City of Portland General Fund

Expenses:	Personnel Services and technology systems and software
Staffing:	Emergency Communications Systems Administrator and Business Systems Systems Analyst III.
Assets and Liabilities:	Technology Systems and Software

Program Information

Bureau:	Bureau of Emergency Communications	**Program Contact:**	Murrell Morley
Website:	https://www.portlandoregon.gov/911/	**Contact Phone**	503-823-0911

Administration & Support

Program Description & Goals

This program provides the general administrative and support services that the bureau requires to fulfill its mission. FPDR strives to keep administrative costs low. Administration & Support spending has hovered between 1% and 2% of bureau expenditures in recent years, a trend expected to continue in the short run. As bureau spending grows - the inevitable result of funding two generations of pensions simultaneously - the percent may decrease even if administrative spending increases. Since the number of covered employees and retirees should remain relatively constant, administrative costs per plan participant can be viewed as a more stable measure of administrative spending. This cost is increasing by just 1.46% for FY 2019-20, less than general inflation.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Administrative cost as a percentage of bureau budget	1.00%	1.49%	1.62%	1.65%	1.52%
FPDR tax levy rate (per $1,000 of Real Market Value)	$1.14	$1.13	$1.10	$1.08	$1.24
Administrative Spending Per Participant	$594	$601	0	$723	$833
Percent of Pension Recipients Who are Paperless	0	36%	0	39%	48%

Explanation of Services

The Administration & Support program provides executive-level guidance, financial analysis and planning, human resource and payroll services, information technology support, legal services, and office management for the bureau as a whole. The purpose of the program is to maximize efficiencies and outcomes for the bureau's pension and disability benefit programs.

Equity Impacts

Not applicable as FPDR does not directly serve the public. The Administration & Support program provides administrative and financial services for the pension and disability programs. Those programs in turn serve only sworn employees, retirees, and beneficiaries, whose composition is not controlled by FPDR.

Changes to Program

No recent changes have been made to this program and no future changes are contemplated.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	75,000
External Materials and Services	0	0	0	659,615
Internal Materials and Services	0	0	0	675,501
Personnel	0	0	0	1,336,175
Fund Expense				
Contingency	0	0	0	11,560,932
Debt Service	0	0	0	54,206,581
Fund Transfers - Expense	0	0	0	1,651,251
Ending Fund Balance	0	0	0	750,000
Sum:	**0**	**0**	**0**	**70,915,055**
FTE	0	0	0	8

Resources: All bureau revenues are booked to the Administration & Support program, 98% of which derive from FPDR's dedicated property tax levy. The levy is a very stable resource. The current levy rate is $1.09 per $1,000 of real market value, well below the $2.80 cap imposed by City Charter. The most recent independent levy analysis calculated a probability of exceeding the cap over the next 20 years of less than one percent. FPDR's two largest secondary revenues are interest income on fund balance and pension and disability overhead charges assessed when third parties contract for Police or Fire services. These revenue sources are more volatile and move with interest rates, fund balance, demand for third-party sworn work and the bureaus' capacity to meet that demand, and pay and overhead rate levels. Very minor revenues include subrogation revenue when third parties are at fault in disability claims, medical payment refunds, divorce-related pension division fees, and repayment of interim disability benefits when claims are denied.

Expenses: Administration & Support expenses include some personnel costs, materials and services costs related to overall bureau operations, and capital costs for occasional upgrades to the FPDR database. As opposed to other bureau programs, some Administration & Support expenses are discretionary, such as the education and office supply budgets. However, other are not, such as the financial audit or technology services, whose costs are set centrally by other City bureaus or Citywide contracts.

Staffing: Eight FTE are dedicated to this program: the Bureau Director, a Manager I, a Business Systems Analyst III, two Financial Analyst IIs, a Legal Assistant, an Administrative Specialist II and an Office Support Specialist II. In FY 2016-17 a part-time Senior Financial Analyst was reclassified to a full-time Management Analyst. (The position was subsequently classified as a Financial Analyst II in the nonrepresented classification study in 2018). There have been no other changes to staffing over the last five years and no future staffing changes are planned.

Assets and Liabilities: This program has one intangible capital asset, the FPDR database, and no liabilities. The database is used to make all FPDR benefit payments and to track general member and beneficiary information. The database is in its seventh year of use and is being depreciated over ten years. However, FPDR expects the database to be in service for longer than three additional years, as the system continues to function well and major technological changes are not currently necessary. FPDR budgets for annual maintenance and periodic upgrades to functionality, but replacement reserves have been deemed unnecessary. Even a complete replacement would be a minor cost in the context of FPDR's overall budget, likely less than one-half of one percent of annual bureau expenditure.

Program Information

Bureau:	Bureau of Fire & Police Disability & Retirement	**Program Contact:**	Stacy Jones
Website:	www.portlandoregon.gov/fpdr	**Contact Phone**	503-823-2609

Disability and Death Benefits

Program Description & Goals

This program provides service and nonservice disability benefits for sworn employees and retirees of the Fire and Police Bureaus (FPDR One, Two, and Three members), pre-retirement death benefits for surviving spouses or minor children, and funeral benefits. The goals of the program are to make disability claim decisions quickly and in compliance with the City Charter, to help sworn employees return to work whenever possible, and to make disability payments accurately and on time. The percent of disability claim decisions reached within 60 days has remained above 90% for the last several years. The number of disability claims filed, as well as the number of members on either short- or long-term disability, has also remained steady.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of members on short-term disability	244	282	244	282	282
Number of medical bills	3,996	3,704	3,855	3,724	3,724
Number of long-term disability recipients	37	35	37	37	38
Percentage of disability claims decisions in 60 days	93%	91%	94%	92%	92%
Number of disability claims filed	342	327	327	335	335
Percentage of workforce on disability at June 30	3%	4%	4%	4%	4%

Explanation of Services

The purpose of this program is to provide a service disability benefit program, in lieu of a workers' compensation program, for sworn City employees, as well as additional disability benefits for nonservice injuries or illnesses. This program provides claim adjudication, medical and vocational rehabilitation benefits, wage replacement payments to members who cannot work, and wage subsidy payments to the Police and Fire bureaus while members are on disability-related modified duty. The program also makes benefit payments to survivors when sworn employees die before retirement, and funeral benefit payments when employees or retirees die.

Equity Impacts

Not applicable as FPDR does not directly serve the public. The disability and death program serves only sworn
employees and retirees, whose composition is based on the hiring of the Fire and Police Bureaus.

Changes to Program

This program continues to see growth in postretirement disability benefits, which cover medical costs for disabilities approved before retirement. Until 2007, only members who were on disability until retirement were eligible for postretirement medical benefits for their approved disability claims. Now, all members who retired in 2007 or later are eligible for these benefits. This has resulted in higher costs and caseloads for this benefit type.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	6,880,092
Internal Materials and Services	0	0	0	458,600
Personnel	0	0	0	1,023,537
Sum:	**0**	**0**	**0**	**8,362,229**
FTE	0	0	0	8

Resources: All FPDR programs, including the disability program, are funded primarily with revenues from the dedicated FPDR property tax levy. This program also receives some subrogation revenue from third parties at fault for injuries to sworn employees. All revenues are booked to the Administration & Support program.

Expenses: In addition to the personnel costs associated with the eight employees engaged in direct disability program delivery, this program's expenses include wage replacement and wage subsidies for members on disability, medical costs, vocational rehabilitation expenses, pre-retirement death survivor benefits, and funeral benefits. Some administrative expenses of the program (such as claims investigation services) are currently booked to the Administration & Support program. Most disability expenses are nondiscretionary and derive from plan benefits defined in City Charter. Disability expenses are most impacted by wage inflation, medical cost inflation, and the number and severity of disability claims.

Staffing: Eight FTE are dedicated to this program: a Manager I, three Analyst IIs, one Analyst I, one Accountant II, one Claims Technician and one Assistant Claims Technician. Last year, a Workers Compensation Analyst position was reclassified to a Senior Workers Compensation Analyst. (The position was subsequently classified as an Analyst II in the nonrepresented classification study.) No future staffing changes are contemplated for this program.

Assets and Liabilities: The disability program has no assets or liabilities.

Program Information

Bureau:	Bureau of Fire & Police Disability & Retirement	**Program Contact:**	Kimberly Mitchell
Website:	www.portlandoregon.gov/fpdr	**Contact Phone**	503-823-3071

Pension Benefits

Program Description & Goals

This program provides monthly pension benefits to sworn retirees hired before January 1, 2007 (FPDR One and FPDR Two members), and their survivors and alternate payees. In addition to paying all beneficiaries accurately, on time, and in compliance with the City Charter and state and federal laws, this program strives to provide active duty members with retirement counseling and accurate pension estimates. The percent of members receiving a final pension benefit that is at least 99% of the most recent estimate given them declined from 100% to 95% last year, but is still within FPDR's target. The percent of members who are within two years of retirement eligibility and have received an updated pension estimate rose to 73% last year.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of FPDR 2 retirements from active service	57	52	50	50	64
Number of pension estimates	397	331	376	397	397
Number of Fire & Police Disability & Retirement 1 and 2 pension recipients	2,018	2,059	2,104	2,132	2,276
Number of pre-retirement workshop participants	126	110	132	156	156
Percentage of members whose final pay was 99% or more of last estimate	100%	95%	95%	95%	95%
Percentage of FPDR 2 members now or soon-to-be retirement eligible who received a pension estimate in the last two years	62%	73%	65%	73%	73%
Median Days to Prepare a Pension Estimate	0	N/A	0	6	6

Explanation of Services

The purpose of this program is to pay retirement benefits to sworn Police and Fire employees, an important component of their overall compensation. The program provides monthly pension payroll services for members, surviving spouses or minor children after a member dies, and alternate payees (former spouses where directed by a court). This includes calculation of pension benefits at retirement, federal and Oregon income tax withholding and reporting, insurance premium and child support withholding, annual COLA increases, eligibility screening for and calculation of an additional pension benefit to offset Oregon tax liability for some members, and monitoring to ensure payments stop when beneficiaries die. This program also provides pre-retirement education and services, including quarterly retirement workshops, retirement education videos and written materials, and pension estimate calculations.

Equity Impacts

Not applicable as FPDR does not directly serve the public. The pension program serves only sworn employees and retirees, whose composition is based on the hiring of the Fire and Police Bureaus, and their beneficiaries.

Changes to Program

This program serves more beneficiaries each year as FPDR Two member retirements continue to outstrip FPDR One deaths. The pension program has also provided an unusually high number of pension estimates in the last several years. For the ten years prior to FY 2015-16, FPDR calculated an average of 240 pension estimates each year. That number has risen to between 331 and 424 estimates per year. FPDR is completing a new pension estimate module for its database to automate as much of the estimate calculation process as possible. Workshop attendance has also increased, from 25 to 50 per year before FY 2015-16, to 100 to 200 per year since.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	131,676,000
Personnel	0	0	0	135,088
Sum:	**0**	**0**	**0**	**131,811,088**
FTE	0	0	0	1

Resources: All FPDR programs, including the pension program, are funded primarily with revenues from the dedicated FPDR property tax levy. This program also receives fees from divorce-related pension divisions. All revenues are booked to the Administration & Support program.

Expenses: This program's expenses include direct monthly pension payments and personnel costs for the one employee solely dedicated to this program. Some administrative expenses of the program (such as the death audit service) are currently booked to the Administration & Support program. Monthly pension costs are nondiscretionary and derive from plan benefits defined in City Charter and federal and state law. Pension expenses are impacted by the number of new retirements, wage increases for active employees, COLA increases awarded to existing retirees by the FPDR Board, beneficiary longevity, and a variety of other factors.

Staffing: One FTE is dedicated to this program, an Analyst I. Program staffing has been stable for the last five years and no changes are planned.

Assets and Liabilities: Unlike most pension plans, FPDR is funded on a pay-as-you-go basis with no long-term investment assets. Pension program assets are limited to fund balance, which is projected to be $17.5 million on July 1, 2019. The long-term liability of the entire FPDR plan is $3.3 billion, but this includes some disability plan liabilities.

Program Information

Bureau: Bureau of Fire & Police Disability & Retirement

Program Contact: Stacy Jones

Website: www.portlandoregon.gov/fpdr

Contact Phone 503-823-2609

Sworn PERS Contributions

Program Description & Goals

This program reimburses the Police and Fire Bureaus for the contributions they make to the Oregon Public Employees Retirement System (PERS) on behalf of sworn employees hired after 2006. Expenses are determined by the number of those employees, their pay, and PERS contribution rates. The number of employees for whom FPDR makes contributions is expected to be 760 in FY 2019-20 and grow to over 1,000 within five years. The bureau's goal is to verify all contributions so reimbursements are accurate, and to remit payment to the Police and Fire Bureaus in a timely manner.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percent of workforce who are FPDR 3	35%	39%	47%	48%	63%
Number of active employees in FPDR 3	535	603	0	760	1,020

Explanation of Services

This program processes bills for sworn PERS contributions prepared by the Fire and Police Bureaus. After verifying employees and contribution amounts, the program sends reimbursement to the bureaus through the City's accounting system.

Equity Impacts

Not applicable as the Sworn PERS Contributions program is an internal service program that reimburses the Police and Fire Bureaus for PERS costs.

Changes to Program

There have been no changes to program operations in the last five years, and none are planned for the future. However, this is FPDR's fastest growing program in terms of expense. In addition to increasing costs attributable to growing PERS rates and wages, expenses increase as employees hired after 2006 make up a greater proportion of the sworn workforce, and as those employees advance through pay steps and are promoted through the ranks. These employees now comprise 39% of the sworn workforce.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Internal Materials and Services	0	0	0	21,450,000
Sum:	**0**	**0**	**0**	**21,450,000**

Resources: All FPDR programs, including the Sworn PERS Contributions program, are funded primarily with revenues from the dedicated FPDR property tax levy. This program receives no other revenues.

Expenses: This program's expenses are made up exclusively of PERS contributions made on behalf of sworn employees hired after 2006. They are fixed by external parameters: the number of sworn employees hired after 2006, their pay, and PERS contribution rates.

Staffing: No FTE are dedicated exclusively to this program. The Financial Analyst IIs assigned to the Administration & Support program verify PERS contribution expenses and remit payment to the Fire and Police Bureaus.

Assets and Liabilities: This program has no assets or liabilities. The portion of the City of Portland's unfunded actuarial liability with the PERS system attributable to Fire and Police employees is booked as a liability to the Fire and Police Bureaus within the City's General Fund.

Program Information

Bureau:	Bureau of Fire & Police Disability & Retirement	**Program Contact:**	Stacy Jones
Website:	www.portlandoregon.gov/fpdr	**Contact Phone**	503-823-2609

Communications

Program Description & Goals

The Communications program provides centralized communication and creative services internally as well as to the media and the public. The Communications program includes the Communications Unit, located in the Chief's Office. The program supports the City's goal to ensure a safe and peaceful community and the bureau's goal of community engagement and inclusion.
In prior years, this program used service metrics from the Auditor's Annual City Service Survey, which was discontinued in FY 2017-18. New potential performance measures, include possible survey work, impacts of the use of social media, and other measures for public communication.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Communications program within the Chief's Office is responsible for ensuring the public has information from the Police Bureau that may be critical to life safety, may involve the need for public disclosure of activities at the bureau, or may increase trust and transparency, with the overall goal to ensure that all members of the community are receiving this information through an accessible medium. The expectation and practice of local law enforcement agencies is to provide timely and transparent information which may be through multiple venues including: press conferences, social media, interviews, website, and written news releases. The Communications Unit provides a media contact point with a sworn bureau member trained in media relations who responds when appropriate to breaking news and researches answers to media inquiries. The Public Information Officer also coordinates with detached PIOs who rotate during off-hours; as well as oversees a professional content writer skilled in strategic communications; a social media content specialist/ web designer; and a graphics designer/ videographer to disseminate content to inform the public. A Community Engagement Officer was recently transferred to the unit from another division and works with specific communities, supporting immigrants and refugees by providing them with information about public safety and improving trust within communities who do not traditionally trust law enforcement. The unit provides coordinated messaging and creative solutions to ensure the public is informed on crime and public safety activities as well as how to access resources, engage our community and illustrate the work officers do in order to build trust and relationships within the community. The unit works to improve internal communications to ensure all bureau members are well-informed and can adequately communicate messages regarding public safety, policy and training that might affect community members. In addition, the unit works with the Personnel Division on recruitment of officers to ensure hiring goals are met. There will be new performance measures associated with this program when this plan has been completed and the bureau begins implementation.

Equity Impacts

The Communications program uses base allocated resources to ensure all members of the community have access to information, often through multiple mediums. Ensuring all members of the public have access to essential information is a core function of the Communications program. This includes providing information on the bureau's website with translation options, the unit creates video content to share, and resources actively engage with the news media to provide the public with up-to-date information related to life-safety of community members.

With the recent reassignment of the Community Engagement Office to the Communications program, the coordinated efforts of the two units are expected to assist the bureau in reaching more community members through the designated advisory boards and other engagement opportunities with the immigrant and refugee populations.

Changes to Program

Base level resources have not been increased in this program outside of inflation for current service level costs. There will be a reduction in overtime incurred by the sworn Public Information Officer as this position and body of work is being reassigned to better distribute the workload. The Community Engagement Office was relocated to the Communications Unit in FY 2018-19. This change is expected to have positive impacts on the bureau's communications with the public by providing a direct point of contact for community advisory boards and better coordination for immigrants and refugees. Other factors impacting this group include the overwhelming demand for responses to media inquiries. The unit is focusing much of the current resources on addressing the media requests for information, providing as much social media content as possible to inform and educate the public, and improve resources and internal messaging.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	16,177	15,877	12,428	17,614
Internal Materials and Services	27,459	38,365	29,043	36,759
Personnel	343,626	384,777	318,642	488,734
Sum:	**387,262**	**439,019**	**360,113**	**543,107**
FTE	2	2	2	3

Resources: The primary funding source for this program is General Fund discretionary resources. The resources are subject to the volatility of the City's General Fund.

Expenses: Staffing resources for the program constitute the majority of the program expenses. There are no significant contracts for services provided by the Communications Unit or the Community Engagement Office. External and Internal Materials and Services support the technology and infrastructure necessary to support the work group.

Staffing: The Communications Program consists of sworn and non-sworn professionals with specific knowledge and expertise in media relations, content development, and communications strategies for the Police Bureau. The only significant change in staffing levels has been the recent reallocation of internal resources to move staff associated with the Community Engagement Office into the Communications Unit.

Assets and Liabilities: There are no assets or liabilities associated with this program.

Program Information

Bureau:	Portland Police Bureau	**Program Contact:**	Lt. Tina Jones
Website:	Website: https://www.portlandoregon.gov/police/29708	**Contact Phone**	503 823 0000

Cycle of Violence Reduction

Program Description & Goals

The seven programs within Cycle of Violence Reduction share a mission to both reduce crime and improve neighborhood safety and livability by targeting chronic crime that involves drugs, gun crime investigations, and crime that begins a cycle of violence in the home. This program supports the City's goal to ensure a safe and peaceful community and the bureau's commitment to crime reduction and prevention. Organizationally, this program consists of the Narcotics Unit, Asset Forfeiture Unit, the Family Services Division, and the Gun Violence Response Team (GVRT).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of gang violence cases cleared	24%	20%	25%	25%	27%
Number of individual doses removed from circulation	26,766,887	26,766,887	27,500,000	30,167,495	31,675,870

Explanation of Services

These programs address a spectrum of criminal violence that threatens public safety and vulnerable members of the public. The Child Abuse Services program investigates child physical and sexual abuse cases. The Domestic Violence Reduction program investigates cases of domestic violence, provides support services for victims and families, and coordinates self-defense training for women and girls through the WomenStrength and GirlStrength programs. The Vulnerable Adult and Elder Crimes program investigates crimes against them, and collaborates with community partners to educate our citizens to prevent future crimes. The Narcotics Unit conducts high level criminal investigations designed to dismantle and disrupt illegal drug trafficking organizations operating within and adjacent to the City of Portland with the goal of reducing the public harm caused through the sales and use of illegal narcotics. Narcotics investigates all overdose deaths. The Asset Forfeiture program tracks equitably-shared proceeds of assets forfeited in federal cases associated with drug and vice cases developed by the bureau. The Gun Violence Reduction Team (GVRT) investigates criminal gun violence and possession and related violence and criminal activity. These programs coordinate with federal and local agencies and the Portland Office of Youth Violence Prevention to reduce criminal activity and guns in Portland's schools.

Both Narcotics and GVRT have staff dedicated to supporting precinct patrol on a rotational basis. As a result, the ability for Narcotics to participate in or initiate new investigations into trafficking organizations has been diminished.

Equity Impacts

Equity factors are considered to the extent that narcotics, gun and gang violence investigations do not target or enforce laws based on any class, protected or not, and all enforcement is based on community threats and probable cause. Direct outreach for community engagement with several of Portland's minority communities has been used to expand the reach of drug education talks to help prevent, recognize and stop illegal drug use. Child abuse services, the domestic violence reduction, and the gun and gang enforcement programs coordinate their work with the Youth Service Division, local school districts, the Office of Youth Violence Prevention, and agencies within Multnomah County to ensure that efforts to reduce victimization from violence reach communities of color.

Changes to Program

The Police Bureau was tasked to reduce General Fund budgeted expenditures by 1%. One of the program reductions to meet this mandate was the elimination of the Strength Programs and elimination of two FTE positions. These are significant programs that address root cause reductions in criminal violence against vulnerable members of the community, however they are not core aspects of the law enforcement mission of the bureau and could successfully be operated by other organizations with comparable effectiveness. The Police Bureau will continue the Strength programs in the FY 2019-20 Adopted Budget, using one-time resources from salary savings to fund the three positions. Going forward there is no identified ongoing resource for the Strength Program. The Drugs & Vice Division was eliminated as a separate command, and the Narcotics Unit assigned to Tactical Operations Division. Narcotics and the GVRT programs deploy officers for rotational support for the short-staffed patrol operations for 25% of the work week. This reduces the effectiveness of these programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	10,499	272,750	740,462	0
External Materials and Services	773,362	821,608	4,563,706	5,247,117
Internal Materials and Services	1,316,082	1,502,612	1,301,166	1,547,114
Personnel	14,071,447	15,635,828	15,315,072	16,861,812
Fund Expense				
Fund Transfers - Expense	0	0	247,020	
Ending Fund Balance	4,869,458	4,824,436	0	0
Sum:	**21,040,848**	**23,057,234**	**22,167,426**	**23,656,043**
FTE	116.83	117	110	121

Resources: Over 95% of the Cycle of Violence program expenditures are funded with General Fund discretionary resources. In FY 2017-18 federal reimbursements for joint investigative activities were $275,000, asset forfeiture proceeds $495,000, and federal grants $40,000. There is no guarantee these external resources will continue to be available at these levels in the future.

Expenses: Close to 88% of the General Fund expense is for personnel, more than 8% covers vehicle, communications and facilities expenses, 2% is required for contracts and agreements for professional services to support victims and the remaining 2% covers operating materials and supplies.

Staffing: Roughly 85% of the positions in the Cycle of Violence programs are sworn law enforcement, three-quarters of which are investigators, one-quarter supervisory. Rotational support of officers for short-staffing in patrol operations will continue to reduce the available sworn staffing levels in these programs for at least two more years.

Assets and Liabilities:	There are no fixed assets associated with these programs. Family Services Division is housed in a rented facility, the rest in City-owned facilities. The principal City-owned equipment includes fleet vehicles and communications gear. Fleet and much of the communications gear has lifecycle replacement funding in place. Replacement of the remaining equipment is from the operating budget.

Program Information

Bureau:	Portland Police Bureau	**Program Contact:**	Assistant Chief Andrew Sh
Website:	https://www.portlandoregon.gov/police/71399 https://www.portlandoregon.gov/police/30560 https://www.portlandoregon.gov/police/30564	**Contact Phone**	

Data Access

Program Description & Goals

The Data Access program provides access to information about reported crimes, which is the foundation of crime analysis and problem-solving efforts of officers and a valuable service available to citizens. Officers need access to information in the field that is reliable, timely, and comprehensive. Organizationally, this program consists of the Records Division and the Information Technology Division. This program supports the City's goal to ensure a safe and peaceful community and the bureau's goal of organizational excellence.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of public records requests	21,655	25,297	26,300	22,271	23,385
Percent of time public records requests are complete within 21 days	14%	11%	35%	16%	95%

Explanation of Services

The Data Access program includes the Records Division, the Information Technology Division, and support for the Regional Justice Information Network (RegJIN). This combination of divisions provides valuable accessibility to the bureau's data for multiple applications, internally and externally. Internal service provision allows for analysis of reported crime data, and records processing makes information available to respond to public records requests. The Records Division received a significant increase in the number of public records requests since the implementation of GovQA, the City's online records request system. These requests are increasingly complex, requiring review from the City Attorney and data collection and validation from the Strategic Services Division. The bureau's internal goal is to respond to requests within 21 days, which is affected by volume of requests and staff available to respond. Turnover in staff and the aforementioned complicated requests contribute to the time it takes to respond. The FY 2018-19 Adopted Budget included $300,000 to support the bureau hiring a consultant to assist in the review and selection of a replacement for RegJIN. There is one year remaining on the current vendor contract and it is anticipated this project will position the bureau to have a replacement selected in time to transition from the current system. The bureau is also evaluating strategies and systems to address generally increasing technology needs. These will seek to provide greater operational efficiencies and effectiveness, as well as maintain the bureau's extensive inventory of technology equipment and infrastructure.

Equity Impacts

Public records requests are entered through the City's online portal. Recognizing all citizens do not have computer access or computer literacy, various police facilities are equipped with other means by which citizens can request reports. In providing victims copies of their police reports at no cost, a monetary burden has been lifted from this population. With this implementation, the equity impacts of this program are neutral in their effect of communities of color and people with disabilities.

Changes to Program

The FY 2018-19 Adopted Budget included additional FTE allocation of 2.0 Senior Administrative Specialists (new classification: Coordinator-I) to join the unit dedicated to responding to public records requests. These additional positions are expected to help in decreasing the existing backlog of public records requests while also fulfilling continually-incoming new requests. The FY 2019-20 Adopted Budget includes $120,000 in General Fund one-time resources to backfill the policy division to waive records fees for victims of crime.

The FY 2019-20 Adopted Budget does not include new resources to support a shortfall in revenue associated with the RegJIN RMS. In order to meet contractual obligations, the Police Bureau will use one-time salary savings generated from vacant positions to fund this expense. It is anticipated that the bureau will be using salary savings, or other internal resources in FY 2020-21 to fund the remaining year of the RegJIN contract. The bureau set aside $2.0 million in equipment replacement reserves in FY 2018-19 toward the RMS replacement project.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	71,539	28,668	230,592	0
External Materials and Services	1,985,864	1,680,286	4,516,156	4,937,323
Internal Materials and Services	8,266,456	8,446,533	9,077,785	8,943,187
Personnel	5,897,156	7,023,619	7,209,061	7,749,231
Fund Expense				
Fund Transfers - Expense	0	0	604,997	0
Sum:	**16,221,015**	**17,179,106**	**21,638,591**	**21,629,741**
FTE	80.75	81.92	80	80

Resources: The primary funding source for this program is General Fund discretionary resources. These resources are subject to the volatility of the City's General Fund. Additional resources include revenue collected through the RegJIN partnership cost-sharing structure, as well as revenue collected through the public records request process.

Expenses: Personnel expenses constitute the majority of expenses for this program. The service contract for the records management system and internal account transfers for Bureau of Technology Services expenses also represent a large portion of program expenses.

Staffing: Personnel in this program are distributed to support the records management system, serve as complaint signers, and perform the necessary duties of operating the Records Division. This is a 24/7 operation, and is impacted by chronic staffing shortages. The bureau is looking into recruitment techniques that will provide for a more readily-available workforce.

Assets and Liabilities: The extent of the bureau's technology infrastructure assets fall under this program, along with the entirety of the records management system. These components are critical to the successful functioning of the bureau on a daily basis. The bureau is currently evaluating replacement options for the records management system.

Program Information

Bureau:	Portland Police Bureau	**Program Contact:**	Jenn Hollandsworth-Reed,
	Police Records https://www.portlandoregon.gov/police/30557		
Website:	RegJIN https://www.portlandoregon.gov/police/69664	**Contact Phone**	503 823 0000

Employee Performance

Program Description & Goals

This program focuses on bureau accountability by investigating, collecting, analyzing, and sharing employee performance data. City and community input is tied to this program through a review board process. Organizationally this program includes the Professional Standards Division, which includes the Internal Affairs Division. The primary objective is to improve employee performance and, in turn, overall bureau performance. The program supports the bureau's goals to enhance accountability and build community trust.

The Independent Police Review (IPR) generates annual reports of allegations of misconduct of police officers, reports commendations received, and is part of the investigatory process to provide transparency and accountability to the public. Internally, the bureau reports performance metrics associated with the use of force incidents as a percentage of total police contacts and/or contacts resulting in arrest.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of calls for service without an Force Data Collection Report (FDCR) level force event	99.84%	99.72%	99.00%	99.74%	99.80%
Percentage of total PPB custodies in which there was no FDCR-level force event	97.68%	95.77%	95.00%	96.16%	97.00%
Percentage of investigated complaints that are sustained (excluding use of force complaints)	50%	37%	38%	45%	60%
Number of community complaints of officer misconduct	396	396	403	409	400
Number of community commendations of officer conduct	110	110	105	95	120

Explanation of Services

This program resides in internally focused groups, the Professional Standards Division and the Internal Affairs Division, dedicated to providing accountability of bureau members through the review and development of policies, the evaluation and auditing of practices, and the internal affairs investigatory process stemming from complaints or allegations of misconduct. Building trust and legitimacy between the bureau and the community of Portland is a goal of both this program and the Portland Police Bureau.

The Professional Standards Division houses resources for policy review and development, mostly centered on the directives which govern bureau standards for performance of sworn and professional staff. Those resources include the Force Inspector, the internal audit team, and the Employee Information System (EIS) program.

The Internal Affairs Division is dedicated to the investigation of allegations of policy violations and/or conduct of bureau members. This unit works with the Independent Police Review (IPR) Division of the elected Auditors Office. This relationship allows community members to bring allegations of conduct to either an agency separate from the Police Bureau or to the Internal Affairs Division within the Police Bureau.

The bureau's reported use of force measures are trending consistently with the prior year as the approximately 95.77% of all custodies do not involve a Force Data Collection Report (FDCR). In the past year the U.S. Department of Justice did increase the number of force categories to be included with FDCRs and as such, the reported numbers have changed from prior force reports. At present, the internal audit team is only in place to review use of force incidents.

Performance measures associated with the Internal Affairs Division stem from data collected by IPR and the Division. In the prior calendar year report, approximately 38% of allegations were found to be sustained, and there was an increase of 61% more commendations received by IPR. Since 2014, the number of internal affairs investigations and corresponding interviews has increased substantially, in part due to a change in practice to conduct complete investigations of all allegations brought forward. Over this same time period there is a caseload increase of 40% per investigator.

Equity Impacts

The Employee Performance Program aims to provide transparency and accountability of police actions through the development of policies and through conducting a procedurally just process in the Internal Affairs Division. Equity implications for new and revised bureau policies is considered during the development of the bureau's directives, which are guiding policy for all employees of the Portland Police Bureau. These directives, and how the bureau holds members accountable to the directives provide assurance to the public that police bureau members are acting in a fair and just manner through the course of their work.

Internally, the division has worked to find process improvement opportunities to assist with providing timely investigations so that all parties are able to feel the process was fair and transparent. There is significant challenge with using internal resources alone, as the workload associated with conducting complete investigations is substantial. The FY 2019-20 Adopted Budget will allow for this program to continue at current levels.

Changes to Program

The FY 2018-19 Adopted Budget includes funding for 3.0 FTE Crime Analyst positions to form an internal audit team within the Professional Standards Division. This team will support the current three analysts in the Force Audit Team and conduct audits on bureau policies and practices to ensure transparency and accountability to the public. The FY 2019-20 Adopted Budget uses internal one-time resources generated from salary savings to continue funding one analyst and one attorney in the City Attorney's Office to support policy and directive review. Over the past three years the number of investigations opened has increased, as each allegation receives a full investigation. The challenges for staffing to workload demand are expected to continue into the next fiscal year with current resource allocations. There have been no significant internal organizational changes to the Professional Standards Division in the FY 2019-20 Adopted Budget.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	84,714	130,260	188,410	117,321
Internal Materials and Services	71,584	90,389	55,022	285,081
Personnel	2,205,688	2,227,719	2,874,364	3,985,686
Sum:	**2,361,986**	**2,448,368**	**3,117,796**	**4,388,088**
FTE	20	21	31	31

Resources: The primary funding source for this program is General Fund discretionary resources. The resources are subject to the volatility of the City's General Fund.

Expenses: Staffing resources for these programs constitute the majority of the program expenses. There are contracts associated with outside transcription and facilitation of the Police Review Board and transcription for interviews conducted by Internal Affairs investigators. Other contractual expenses support EIS and this expense is shared between the Police Bureau and the Independent Police Review. Discretionary spending in this program is associated with staff development, travel, and general office support expenses.

Staffing: There are no significant staffing changes in the current service level budget for the Employee Performance program. The majority of the staffing resources are non-sworn professional staff positions. There are limited options internally within the bureau to realign other non-sworn professional staff into positions within this program when vacated due to the specialized nature of conducting program and performance auditing and internal affairs investigations. The FY 2016-17 Budget included resources to meet the demand for services and the FY 2018-19 Budget established a policy audit team to work with the Force Audit Team.

Assets and Liabilities: There are no assets or liabilities associated with this program.

Program Information

Bureau:	Portland Police Bureau	**Program Contact:**	Commander Bryan Parman
Website:	DOJ Materials https://www.portlandoregon.gov/police/62044 Directives https://www.portlandoregon.gov/police/29867	**Contact Phone**	503 823 0000

Emergency Response and Problem Solving

Program Description & Goals

The Emergency Response and Problem Solving program is the Police Bureau's largest program and it includes patrol, emergency management services, and specialized tactical units such as the Explosives Disposal Unit and the Special Emergency Response Team. This program supports the City's goal to ensure a safe and peaceful community and the bureau's goal of crime prevention and reduction.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of incidents dispatched	248,225	262,131	282,000	269,000	282,450
Number of officer-initiated calls for service	83,861	94,790	83,000	100,000	104,269
Number of telephone reports	11,544	12,183	11,000	10,000	12,302
Average travel time to high priority dispatched calls in minutes	6.55	6.59	6.75	6.69	5.50
Number of Citizen Online Reports	20,271	21,516	25,000	26,000	22,592
Number of Crime Against Society offenses (NIBRS data)	2,400	2,644	2,400	2,500	2,200
Number of Crime Against Persons offenses (NIBRS data)	8,344	9,213	9,500	10,000	9,029
Number of Crime Against Property offenses (NIBRS data)	49,611	50,140	53,000	50,000	49,137
Number of Crime Against Society offenses per 1,000 residents	3.80	4.10	3.70	4.00	4.00
Number of Crime Against Persons offenses per 1,000 residents	13.30	14.40	14.62	15.20	12.40
Number of Crime Against Property offenses per 1,000 residents	79.07	78.50	81.54	75.90	75.00
Number of Directed Patrol Calls for Service	2,303	2,168	3,000	500	1,500
Total Reported Offenses	60,355	61,997	64,900	62,500	66,957
Total Reported Incidents	55,407	56,937	58,500	59,000	60,353
Recovery Rate for Motor Vehicle Theft	81%	82%	80%	80%	85%
Average call queue time until a responding officer is available (high priority calls)	2.03	2.02	2.15	2.00	1.50
Number of dispatched calls per 1,000 residents	396	410	434	408	412

Explanation of Services

The Emergency Response and Problem Solving program encompasses some of the most core work performed by the bureau. When a citizen calls 9-1-1 for police response to a crime, the services provided are most likely to be performed by personnel within this program. Responding to crime and initiating problem-solving activities to prevent and reduce crime remain the key activities of the Portland Police Bureau. These efforts are designed to reduce the overall incidence of crime and to reduce the fear of crime in the community, promoting a sense of neighborhood and personal safety.

The bureau monitors emerging crime trends and shifts resources where necessary to address upward trends. However, the shortage of sworn members available to meet the increased demand for services is resulting in degraded performance reports and crime trends. Dispatched calls per patrol officer as a measure increased by over 30% between FY 2015-16 and FY 2017-18, and is expected to increase by another 8% in FY 2019-20 as a result of a continually increasing number of incidents dispatched and a stagnant or declining number of officers available to respond. Crime volume measures, including reported crimes against persons and reported crimes against property, are increasing and are impacting community livability in Portland. The majority of performance measures in this program are in decline, and this trend will continue into future years if left at the current staffing and service delivery model.

Equity Impacts

All officers are required to complete equity and implicit bias training as part of the mandatory training curriculum. Concerning persons with disabilities, the bureau partners with multiple disability groups to help inform making enforcement decisions and also allow the bureau to be considerate of and address possible mobility and communications barriers in interactions with the public.

Program response is administered on the basis of priority; to that extent, any community or individual with ability to call for 9-1-1 response has equal opportunity to receive attention. If the community disproportionately reports crime based on implicit or explicit bias, the Police Bureau has limited ability to detect this or modify response. Analysis on reported crime and crime trends can influence the location of targeted missions, but no racial information is collected or used in any of these analyses. Due to staffing shortages, many individuals are being encouraged to submit on-line reports. This presents a potential inequity, as it presumes literacy, ability, and internet and computer access.

Changes to Program

The bureau has a number of new officers in their 18-month initial probation period, and upon successful completion they will be able to respond to calls. However, due to a large numbers of recent retirement it is likely the bureau will experience the positive impacts new officers will have on performance metrics in the next fiscal year.

In FY 2018-19, the bureau piloted assigning a Police Sergeant position to the Bureau of Emergency Communications (BOEC) dispatch floor as a strategy to affect declining performance measures in the current delivery model. The goals of the pilot are to improve communication and coordination with BOEC call takers and dispatchers, reduce the number of non-priority calls for service routed to patrol officers for response, and to improve customer service to the public.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	230,308	78,373	245,306	0
External Materials and Services	1,026,530	1,246,716	900,538	939,267
Internal Materials and Services	6,575,260	7,472,848	7,270,885	8,140,452
Personnel	68,178,680	73,522,314	68,946,180	71,024,187
Sum:	**76,010,778**	**82,320,250**	**77,362,909**	**80,103,906**
FTE	549	541	549	532

Resources: The primary funding source for this program is General Fund discretionary resources. These resources are subject to the volatility of the City's General Fund.

Expenses: Personnel expenses constitute the majority of expenses for this program and are both relatively fixed and predictable. To the extent the bureau carries vacancies in personnel, the nature of this program necessitates backfilling person hours with overtime assignments. This is tracked and reported on a public-facing dashboard each month. Each unit within the program also has an individual materials and services budget to provide items necessary for operation, including both internally- and externally-sourced resources.

Staffing: More than 500 sworn and professional staff FTE are allocated to this program, which constitutes just over 40% of the bureau's total personnel. The sworn positions authorized to this program constitute more than half of the bureau's sworn positions. These positions are responsible for responding to calls for service and administratively supporting that function. Although FTE allocation has not changed dramatically over the last five years, physical staffing in this program continues to be affected by the bureau's attrition and ability to hire. In order to meet shift staffing minimums, the bureau's non-patrol units and divisions have been providing staffing support on a rotating basis.

Assets and Liabilities: The Emergency Response programs operate and maintains a variety of equipment and vehicles for patrol and tactical response, including manned aircraft for Air Support Unit response. One of the bureau's aircraft will be due for replacement within the next five years (estimated $3.5 million dollars), and at this time the bureau does not have a specific replacement funding plan for this expense.

Program Information

Bureau: Portland Police Bureau

Website: Precincts https://www.portlandoregon.gov/police/43598 Air Support Unit https://www.portlandoregon.gov/police/article/250326 Canine Unit https://www.portlandoregon.gov/police/article/420232

Program Contact: ACs Chris Davis & Andrew

Contact Phone 503 823 0000

Human Resources Development

Program Description & Goals

The Human Resources Development programs are responsible for hiring, training and equipping bureau personnel, overseeing job performance evaluations, and managing the promotion process. Program activities are focused on encouraging a diverse workforce committed to the community policing mission and the goals of the bureau, support the City's goal to ensure a safe and peaceful community and the bureau's goal of organizational excellence. Organizationally, these programs consist of the Personnel Division, the Training Division, and the Quartermaster program.

The percentage of new sworn hires who are female has increased from 14% to 19% over the past four years.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of new sworn hires who are female	16%	19%	22%	20%	25%
Percentage of new sworn hires comprised of people from communities of color	24%	25%	28%	25%	30%
Percent of newly hired officers that complete initial probation	84%	87%	83%	85%	85%
Percentage of sworn members who identify as a female and/or a person of color	29%	29%	29%	30%	35%

Explanation of Services

Staffing and succession planning remain a critical focus as the bureau faces an increasing demand for core services. There remains a large number of sworn staff that are at or near retirement eligibility, with more than 75 currently eligible to retire this fiscal year. The expectation is that more than 100 will retire within the next 18 months. At the same time the bureau is now faced with substantial difficulty attracting and hiring qualified candidates. The Personnel Division is tasked with recruitment and hiring of a diverse set of candidates to fill sworn and professional positions in the bureau.

Training is a cornerstone program for both newly-hired and for current members of the bureau. State of Oregon Department of Public Safety Standards and Training (DPSST) is mandated by statute to provide basic training for all law enforcement officers in Oregon. The Basic Academy training is a 16-week program designed to develop basic skills in all the disciplines needed for performing patrol work. Portland Police Officers attend a 12-week Advanced Academy subsequent to their 16-week Basic Academy. The Advanced Academy builds on the foundational training recruit officers receive at Basic and develops higher levels of skill and confidence in communication, application of the law, decision-making, and tactics. Officers receive 18 months of extensive training and mentoring in the Field Training and Evaluation Program (FTEP) before earning their final State of Oregon Certificate.

The Portland Police Bureau operates an annual in-service for sworn personnel to refresh their skills and train on the latest law enforcement tactics, techniques and strategies. Our goal is to continually develop the best trained police officers to safely and effectively meet the needs of Portland citizens. On average, Portland officers participate in 30 hours of in-service training per year, exceeding State of Oregon requirements.

The Training Division includes the armorer and provides all firearms standards and training. The Quartermaster program outfits each bureau member with uniforms and equipment.

Equity Impacts

The Human Resources programs are tasked with recruiting, hiring, and successfully training employees from diverse racial and cultural backgrounds. Annual in-service training is provided to promote service that is inclusive, culturally competent, and sensitive to explicit and implicit bias. The in-service training's equity curriculum's goals are to: increase comfort in talking about race; increase knowledge of institutional racism; identify institutional racism in policy, practice, and procedures; increase understanding of implicit bias; and explore strategies to address institutional racism in the workplace.

Changes to Program

The principal complicating external factor is difficulty generating a large enough pool of highly qualified candidates that wish to become police officers. This is an issue nationally, driven both by a highly competitive labor market and evolving public perceptions of work in law enforcement today. The Personnel Division continues to review the recruitment strategies to increase their effectiveness.

The Training Division has added four sworn positions to allow it to develop Advanced Academy courses that include the most current required information and skills. This will enable them to have two teams, leap-frogging each other from curriculum development to instruction. This will help to deliver fresh, current and relevant training for each in-service session.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	187,300	120,600	68,546	0
External Materials and Services	3,651,608	3,861,924	5,412,587	3,717,370
Internal Materials and Services	2,798,719	2,263,228	5,002,206	4,088,737
Personnel	11,102,967	13,110,358	16,040,426	12,793,570
Sum:	**17,740,594**	**19,356,111**	**26,523,765**	**20,599,677**
FTE	113.25	117	182	180

Resources: These programs operate with General Fund discretionary resources. The Training Complex is made available to other law enforcement agencies, and fee revenue recovers the program expense associated with that service.

Expenses: The predominant expense is payroll, at 60% of the total. The remainder covers uniforms and equipment, fleet, communications, and facilities.

Staffing: Personnel Division staff are roughly split between administering a full set of human resource management functions and the recruitment process. A dedicated recruiter was added in the past three years. Training Division staff develop and deliver Advanced Academy and in-service training, manage the FTEP for officers in initial probation, and run the armory program. Increased success in recruitment may stress the Training Division's resources. Satellite instructors will continue to be adjunct trainers for specialty topics and tactics.

Assets and Liabilities: The Training Division occupies a facility that was opened in 2014. It was renovated specifically to provide for classroom and tactical training for Advanced Academy, in-service, and annual skills qualifications. Major maintenance reserves are funded from annual operating expense, and most vehicle and communications equipment fund lifecycle replacement reserves in the same manner. Replacement of most other equipment is funded as an annual operating expense.

Program Information

Bureau: Portland Police Bureau

Program Contact: Assistant Chief Ryan Lee

Website: Training https://www.portlandoregon.gov/police/64480
Recruiting https://www.joinportlandpolice.com/
https://www.portlandoregon.gov/police/72106

Contact Phone 503 823 0000

Investigations

Program Description & Goals

The Investigations programs share a mission to investigate major crimes and apprehend criminals. Organizationally, these programs reside in the Detective Division, the Criminal Intelligence Unit, the Property and Evidence Division, and the Forensic Evidence Division. These programs support the City's goal to ensure a safe and peaceful community and the bureau's commitment to crime prevention and reduction. The performance trend for case clearance rates has deteriorated for both person and property offenses over the past three years. This is in the context of increasing incidence of these offenses as well as the rate of both relative increasing population.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Crimes Against Persons Offenses Cleared	37%	36%	35%	35%	40%
Percentage of Crime Against Property Offenses Cleared	10%	10%	10%	10%	12%

Explanation of Services

The Detective Division includes the person crimes, property crimes, sex crimes, and complaint signer programs. The person crimes program investigates homicides, assaults, robbery, bias crimes, and sex offender registration. The property crimes program investigates fraud, burglary, and monitors pawn shops for stolen goods. The sex crimes unit focuses on crimes of sexual violence.

The Forensic Evidence Division collects and identifies crime scene evidence in coordination with the investigative process. The Property and Evidence Division secures and maintains the integrity of evidence and property for the Portland Police Bureau, community, and partnering agencies until disposition under the laws and ordinances of the State of Oregon.

The Criminal Intelligence Unit (CIU) provides investigative support involving cases of organized crime, domestic and international terrorism, Homegrown Violent Extremists (HVE), threats to commit acts of mass violence, and special investigative projects. CIU complies with all federal and state laws regarding the collection, retention, and dissemination of intelligence information.

The two key measures of effectiveness for Investigations, the clearance rates for crimes against persons offenses and crimes against property offenses, have both deteriorated over the past three years. Over the same timeframe the incidence of both categories of crime has increased, the population has increased, and the rate per 1,000 population has also increased.

Equity Impacts

Community members are involved through ongoing participation in diverse community groups and programs. Equity is considered when operational decisions are made for staffing levels and case assignment with an evaluation of impacts on underserved and vulnerable community groups. This year a Bias Crimes detective and a Human Trafficking detective, and the Assault Unit began establishing new relationships with service providers to the houseless population due to their high level of victimization involving Measure 11 assaults. Data are analyzed to ensure resource adjustments are evidence based and shifted to provide the highest possible level of service.

Changes to Program

While the population of Portland continues to increase, and the trend for both person and property crime has increased both in quantity and relative to the increased population, the staffing level available to run these programs has remained stagnant. This has led to an increase in the case load carried by the investigators in these programs. Staffing levels are redistributed among the programs to address relative changes in the demands placed on them by trends in the types of crimes that need to be investigated.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	54,878	91,419	39,108	0
External Materials and Services	963,937	1,017,541	1,706,685	1,827,927
Internal Materials and Services	1,790,346	1,765,242	1,546,515	1,804,336
Personnel	20,689,867	23,676,728	22,807,636	22,673,745
Sum:	**23,499,028**	**26,550,930**	**26,099,944**	**26,306,008**
FTE	177.83	177.33	191	169

Resources: The Investigations programs are funded mostly with General Fund discretionary resources. Grants and federal reimbursements for joint investigative activities amount to less than 2% of the resources.

Expenses: Roughly 90% of the expense is related to staffing. Another 6% is for vehicle fleet operations, communications and facilities expenditures. Service contracts and operating materials and supplies makes up 4% of the expense.

Staffing: Sworn positions make up 71% of the staffing level, 15% of which are supervisory positions. The number of positions has remained fairly stable for the past five years. Staffing needs will continue to increase as the incidence of crimes that require investigation continues to increase.

Assets and Liabilities: The principal City assets employed by these programs are vehicles, communications equipment, and facilities, all of which are managed by City bureaus within the Office of Management and Finance. Most vehicle and communications equipment has lifecycle replacement funding provided by the annual operating budget.

Program Information

Bureau:	Portland Police Bureau	**Program Contact:**	Assistant Chief Andrew Sh
Website:	Detective Division https://www.portlandoregon.gov/police/41767 Criminal Intelligence https://www.portlandoregon.gov/police/76178 Property and Evidence Division https://www.portlandoregon.gov/police/41011	**Contact Phone**	503-823-0000

Neighborhood Safety

Program Description & Goals

The Neighborhood Safety program supports neighborhood problem solving, a joint commitment of residents and neighborhood Police Officers. This is a major principle of community policing and provides a greater foundation of trust from which all bureau programs benefit. The units within this program each foster strong relationships with community members, groups, and outside agencies.

This program supports the City's goals to ensure a safe and peaceful community and to improve the quality of life in neighborhoods. The program supports the bureau's goal of crime reduction and prevention.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of Service Coordination Team Graduates	32		30	30	
Percentage of Individuals Connected to Services by the Service Coordination Team Program	83%	84%	85%	85%	85%
Number of Behavioral Health Response Team Referrals For Service	1,012	999	1,000	1,250	1,300
Percentage of Behavioral Health Response Team Referrals Assigned	44%	55%	60%	55%	55%
Percentage of Behavioral Health Response Team Outcomes Facilitated Through Behavioral Health System Coordination (Coordinated Services, Systems Coordination, Civil Commitment)	46%	42%	50%	49%	50%

Explanation of Services

This program consists of School Resource Officers, precinct Neighborhood Response Teams, the Alarm Administration Unit, Public Safety Support Specialists, and the Behavioral Health Unit.

School Resource Officers monitor school safety, reduce truancy, and focus on keeping youth out of the criminal justice system. Officers assigned to schools also respond to calls requiring police response, such as reports of abuse and threats of violence, and alleviate the number of calls that would otherwise fall to precinct patrol.

Neighborhood Response Team (NRT) officers work with neighborhood groups and business associations on broader strategies to address chronic problems in their specific areas of the City. Precincts can also assign NRT officers to work with residents on neighborhood problems in a specific geographic area.

The bureau's Alarm Administration Unit contributes to the Neighborhood Safety program by working with business and residential alarm system owners to ensure proper system use and bureau response.

Public Safety Support Specialists are currently being recruited, as this is a new unit within the bureau. Their presence is anticipated to have a positive impact on community relations and positively affect response metrics on low-priority calls for service.

The Behavioral Health Unit (BHU) pairs clinicians with responding officers to provide specific mental health crisis response to calls for service. The program believes in the importance of collaboration and coordination with stakeholders to provide appropriate, sustainable interventions for those in behavioral health crisis and aims to not only best serve persons in mental health crisis, but also reduce incarceration for these persons by providing them with more appropriate response and resources. Community members are actively involved in the guidance of BHU and Service Coordination Team (SCT) services, training, and the implementation of various service delivery methods. The BHU Advisory Committee meets monthly and provides guidance and recommendations as to the work done within BHU and the SCT program. The program is also one of the compulsory elements required for the City to meet the terms of the U.S. DOJ Settlement Agreement.

Equity Impacts

To the degree the units within this program reach vulnerable and historically underserved populations within the city, along with the strong community partnerships cultivated and maintained by these units, this program is a particular benefit to communities of color and persons with disabilities. All persons requiring response or resources would have access to these services as necessary.

Not every citizen has an alarm system, and false alarms take officers away from other citizens in need – including those who cannot afford a system. The Alarms Administration Unit engages alarm owners and provides education on proper alarm use and testing to decrease the number of false alarms so this impact is less.

Changes to Program

The FY 2018-19 Adopted Budget included an opportunity for the BHU and SCT programs to expand into areas previously identified as having a need for additional services. With additional allotted funds, BHU expanded the response team program by two full teams of officer/clinician partnerships. The responsibility of one of those two teams is intensive outreach to individuals who are experiencing mental health symptoms as well as homelessness.

The Alarms Administration Unit has completed a replacement ordinance to change the current City Code Chapter 14B.10 governing the administration of the unit, permit requirements for burglary and duress alarm systems, and police bureau interaction with alarm customers. It is anticipated these changes will reduce the impact private alarm systems have on bureau resources, chiefly in the number of false alarms that currently demand police response.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	37,840	0
External Materials and Services	1,855,664	2,324,685	3,127,619	4,419,554
Internal Materials and Services	348,438	375,040	381,269	428,915
Personnel	4,714,455	5,067,781	6,570,648	7,178,740
Sum:	**6,918,557**	**7,767,507**	**10,117,376**	**12,027,209**
FTE	43	45	47	60

Resources: The primary funding source for this program is General Fund discretionary resources. These resources are subject to the volatility of the City's General Fund. The Alarms Unit also brings in revenue through registration fees and false alarm fines, which supports total program expense.

Expenses: Personnel expenses constitute the majority of expenses for this program and are both relatively fixed and predictable. Contract costs for Alarms Unit software and BHU clinicians are also budgeted and predictable expenses. Each unit within the program also has an individual materials and services budget to provide items necessary for operation, including both internally- and externally-sourced resources.

Staffing: These units are typically staffed to their allocated FTE capacity, given the specialized nature of their function. That said, physical staffing in this program continues to be affected by the bureau's attrition and ability to hire. In order to hit shift staffing minimums in precincts, NRT officers are called upon to provide operational support for patrol operations. This is expected to continue through FY 2019-20.

Assets and Liabilities: This program has no assets or liabilities.

Program Information

Bureau:	Portland Police Bureau	**Program Contact:**	ACs Lee, Shearer, and Dav
Website:	Behavioral Health Unit: https://www.portlandoregon.gov/police/62135 Alarms: https://www.portlandoregon.gov/police/30568 Neighborhood Response Teams: https://www.portlandoregon.gov/police/article/668128	**Contact Phone**	503 823 0000

Citizen Partnership

Program Description & Goals

The Citizen Partnership program fosters a partnership between the police and the public, a major principle of community policing. The program undertakes activities created specifically to bring police and residents together to work cooperatively on issues of broad community interest. Organizationally, this program consists of the Sunshine Division, Police Cadets, and the Crisis Response Team. This program supports the City's goal to ensure a safe and peaceful community and the bureau's goal of community engagement and inclusion.
There are limited programmatic performance metrics associated with the Citizen Partnership program. Current metrics associated with this program are workload measures within the Sunshine Division.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of children served with Sunshine Divisions Shop with a Cop program	490	457	550	470	500
Sunshine Division- number of 24/7 Emergency Food Boxes & Holiday Boxes distributed at three precincts annually	530	508	570	515	525

Explanation of Services

The Citizen Partnership Program exists to provide services to community partners in need of resources where law enforcement is able to provide assistance. The Crisis Response Team (CRT) is a group of screened and community volunteers from various ethnic, religious, professional and personal backgrounds. Volunteers receive 40-hours of training through Crime Victims Assistance Network that include Crisis and Trauma Intervention, Victim Advocacy, Domestic Violence Victimization, Elder Abuse, Issues of Confidentiality, Gang Life, Understanding Policing and more. This resource is often called out to provide on-site support to victims and survivors when there are serious and/or fatal incidents.
In addition to the immediate on-site support to victims/ families the CRT support continues by accompanying an injured person to emergency facilities, home visits, coordinating additional support services, death notifications, planning and attending funerals. The CRT works closely with the District Attorney's Victims' Advocates to ensure smooth transition for the victim throughout the criminal justice proceedings. The CRT can be utilized as intervention partners during high profile verdicts, cultural holidays and other major events to dispel tension and rumors. Program results are currently tracked through workload data, such as the number of call-outs and the hours of volunteer support utilized. Recently, the CRT and the Strategic Services Division developed a methodology for collecting additional data to inform resource deployment and impact analysis.
The Sunshine Division provides one officer as a resource to coordinate with the non-profit Sunshine Division. Services are centered on community outreach with vulnerable youth, such as the Shop With a Cop event, and the officer facilitates the dispersal of community food boxes through the bureau's three precincts to community members in need. There has been consistent demand for this service in the precincts. Members express gratitude frequently for this service as it has positive impacts on their well-being.

Much of the Sunshine Division is a partnership with the non-profit organization which manages the donation drives, a warehouse, and the annual reporting duties of the organization. Over the past three years the number food donations distributed through precincts has consistently fluctuated between 450-500 boxes, which equates to approximately 1.3 boxes per day every day of the year.

Equity Impacts

The CRT program manages a diverse volunteer base to provide resources in sensitive situations who will be able to work in a culturally competent manner with the impacted families and youth. The officer assigned to this program coordinates four active teams of volunteers: African-American, Asian/Pacific Islander, Hispanic, Russian and Sexual Minorities. There are additional community contacts within several other communities not included in the four teams. This program provides a service, often to disadvantaged demographics in the local population that other agencies do not have capacity or programs in place to make contact during the incident. This allows persons who might otherwise not have access to support to have resources available.

Changes to Program

There are no significant changes to the Citizen Partnership program in the FY 2019-20 Adopted Budget. There is significant demand for services for both CRT and assistance through the Sunshine Division. By dedicating officer resources to these programs, the bureau is also able to stay connected with vulnerable citizens within the community. Organizationally, there are no internal reallocations of resources in FY 2019-20. There is a sizeable volunteer base supporting this program which assists with the workload when internal resources are not available.
In FY 2018-19 the Reserve and Cadet program was scaled back to focus primarily on the Cadet Program. Reserve Officers are currently not utilized by the Portland Police Bureau.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	13,346	113,494	105,586	103,068
Internal Materials and Services	52,167	54,246	59,682	48,794
Personnel	229,982	343,715	444,738	315,922
Sum:	**295,495**	**511,454**	**610,006**	**467,784**
FTE	2	2	2	2

Resources: The primary funding source for this program is General Fund discretionary and a minimal amount of donations, both financial and in-kind. The resources are subject to the volatility of the City's General Fund.

Expenses: Staffing resources for these programs constitute the majority of the program expenses. There are no significant contracts for services provided by the Sunshine Division or the Crisis Response Team. The CRT unit also has a significant number of trained volunteer resources to assist with call-outs.

Staffing: There are 2.0 FTE associated with the Citizen Partnership program. Both are sworn officer positions. There is 1.0 FTE designated as a liaison for the Sunshine Division and 1.0 FTE servicing the Crisis Response Team in the Youth Services Division. The most significant challenge to staffing these programs with sworn resources is the limited number of filled officer positions is primarily dedicated to operations and investigations services, leaving fewer resources to go into other programs. The Cadet program does not have dedicated FTE, and is run through use of internal assignments in the Youth Services Division.

Assets and Liabilities: The majority of the assets associated with this program are managed by the local non-profit portion of the Sunshine Division. City-owned assets in the Sunshine Division consist of vehicles used to transport goods between the main warehouse and precincts. These are on a scheduled lifecycle replacement program.

Program Information

Bureau: Portland Police Bureau

Program Contact: Assistant Chief Chris Davis

Website: Cadet Program: https://www.portlandoregon.gov/police/article/420436 Sunshine Division: https://sunshinedivision.org/

Contact Phone 503 823 0000

Strategy & Finance

Program Description & Goals

The Strategy and Finance program oversees internal systems for managing funds and people, and ensures the Police Bureau's budget, strategic plans, policies, and procedures reflect community priorities. Organizationally this program includes the Chief's Office, the Strategic Services Division, and the Fiscal Services Division. This program supports the City goals of ensuring a safe and peaceful community and delivering efficient, effective, and accountable municipal services. It supports the bureau's goals of crime reduction and prevention, community engagement and inclusion, and organizational excellence.

The bureau has received its report from the US Department of Justice (DOJ) regarding the Settlement Agreement between the DOJ and the City updating the current status of the percent of Police Bureau tasks complete. The report indicates that the bureau is compliant or near compliance in 100% of the mandatory tasks.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of the DOJ Agreement Tasks assigned to PPB that are actively in progress or completed	96%		100%		100%

Explanation of Services

The Chief's Office provides overall strategic direction and leadership to the Police Bureau. Organizationally, this unit includes the Chief, Deputy Chief, and the Assistant Chiefs responsible for the three organizational branches of the bureau: Operations, Investigations, and Services Branches. Key projects in the current fiscal year include setting bureau direction for crime reduction strategies and the creation of a five-year strategic plan, which is set to begin in FY 2019-20. Outcomes and performance measures for this unit are expected to be developed with this new strategic plan. Currently, the bureau reports the progress on achieving compliance with the terms of the Settlement Agreement between the City and the US Department of Justice.

The Strategic Services Division (SSD) is responsible for the analytical research partnerships with patrol operations to provide analysis of reported crimes. This team conducts evaluations of patrol tactics on crime reduction, models response options for precinct commanders to deploy resources based on trend analysis, and manages the bureau's open data portal where reported crime trends, response times, and stops data are made available to the public. Recently, the bureau completed a pilot project for a server-based information sharing program expected to gain further efficiencies in using data for patrol tactics.

The Fiscal Services Division provides internal business service support for the bureau. This includes development and management of the bureau budget and resources, internal support for the bureau's fleet of 700 vehicles and related equipment, facility program management, the Alarms Administration Unit for permitting of burglary and robbery alarms, inventory and equipment management, grant management, and transactional accounting for payroll, accounts payable and receivables. Initiatives underway in Fiscal Services include modernization of current data and account management practices in the Alarms Administration Unit, digitizing payroll documents, and the implementation of an inventory management system to better quantify and plan for current and future equipment purchases.

Equity Impacts

The Chief's Office is accountable and responsible for the bureau's implementation of the Racial Equity Plan (REP), which is in the second year of its five year goal for full implementation, as well as the Bureau's Affirmative Action Plan. The bureau's Equity and Diversity Office (EDO) located within SSD is actively tracking bureau progress on the action items and has identified delays or resource shortfalls. The EDO also provides a valued service by ensuring operations, policies, and training use an equity lens in the development and that data collection occurs to ensure practices do not disproportionally impact the public.

Through use of an open data platform, SSD is able to provide data to the public via online dashboards. This model allows for transparent sharing of data, however access to the data may be challenging for members of the community requiring either ADA accommodations or have limited internet access. The information is available upon request, and this does represent a challenge in sharing information or reporting crime trends and analysis to the public.

Changes to Program

The FY 2019-20 Adopted Budget includes changes to the allocation of bureau External Materials and Services, resulting in a decrease in resources within the Chief's Office. The majority of this expense is associated with contracts for outside service providers and the expense is allocated to the program in charge of the service delivery.

The bureau formed a work group to identify and evaluate options for operational efficiencies to adhere to the constraint of 1% of current service level allocations. This group has identified some small projects however the group was unable to identify any hard cost reduction strategies to mitigate the impacts of a 1% constraint to the current service level budget. In the short term there is adequate projected salary and internal savings. However, without a future reduction in services or programs the bureau will be further constrained through a structural deficit as the projected expenses will outpace the available resources to support ongoing operations.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	643,446	0
External Materials and Services	4,316,820	3,932,304	5,080,547	4,127,505
Internal Materials and Services	8,614,037	9,514,967	8,385,733	10,199,828
Personnel	9,373,177	9,470,195	17,790,592	20,463,982
Fund Expense				
Fund Transfers - Expense	0	0	2,000,000	0
Sum:	**22,304,034**	**22,917,466**	**33,900,318**	**34,791,315**
FTE	58.67	59		

Resources: The primary funding source for this program is General Fund discretionary resources. The resources are subject to the volatility of the City's General Fund. Additional resources received through Federal and State grants have supported specific initiatives within this program, in particular in the Strategic Services and Fiscal Services Divisions.

Expenses: Staffing resources for these programs constitute the majority of the program expenses. Within the Chief's Office there are resources for department overhead and other planned project expenses. This is to allow for the other program budgets to represent the costs associated with daily operations of the division. Significant changes to bureau expenses in this category include the planned expenses for facility projects and equipment replacement for items not currently on life-cycle replacement programs. The bureau is actively pursuing an inventory system to manage these assets and plan for out-year replacement through the use of a reserve fund.

Staffing: The FY 2019-20 Adopted Budget does not include significant internal realignments of resources within the Strategy and Finance program. The FY 2018-19 Adopted Budget included the addition of 1.0 FTE Data Analyst in the Equity and Diversity Office within SSD.

Assets and Liabilities: There are no assets or liabilities associated with this program.

Program Information

Bureau:	Portland Police Bureau Fiscal Services Division https://www.portlandoregon.gov/police/63881	**Program Contact:**	Catherine Reiland
Website:	Police Bureau Open Data https://www.portlandoregon.gov/police/71673	**Contact Phone**	503 823 0000

Traffic Safety

Program Description & Goals

The Traffic Safety programs address neighborhood and business district concerns about traffic and transit system safety for motor vehicles, bicycles, and pedestrians. The programs reside in the Transit Police and the Traffic Divisions. They support the City's goals to ensure a safe and peaceful community and the bureau's commitment to crime reduction and prevention.

The number of Major Crash Team call-outs in FY 2017-18 was 63, compared to 74 in FY 2016-17 and 52 in FY 2015-16. Traffic fatalities continue a trend of annual increases, from 40 to 42 to 52 over the past three fiscal years.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of traffic collision fatalities annually	42		70	40	35
Percent of traffic enforcement encounters resulting in a written warning	89%	13%	85%	87%	85%
Percent of traffic enforcement encounters resulting in an issued citation	11%	87%	15%	13%	15%
Number of DUII arrests per on-shift traffic officer	160	113	160	113	125
Number of Major Crash Team Call Outs	50		80	75	52

Explanation of Services

The Traffic Division is charged with the duties of traffic enforcement, including photo enforcement of speed and red light signals, serious injury collision investigation, fatal collision investigations, DUII enforcement, traffic complaints, and major traffic crime investigations. The Traffic Division also provides traffic control services for numerous community events including parades, demonstrations, dignitary motorcades, and sponsored runs and walks. The Traffic Division is committed to providing enforcement and raising awareness regarding traffic safety for vehicles, bicyclists and pedestrians. The Portland Police Bureau is an active partner in the City's Vision Zero plan, which is focused on reducing and eliminating traffic fatalities in the next ten years. In calendar 2018 it conducted 50 Vision Zero missions in which 174 classes were offered, 1,122 citations were issued, and 392 written warnings given. In the past two years the Traffic Division has also provided driver education classes for English language learners, which has served community members including immigrant and refugee populations in Portland and the surrounding area.

The officers of the Transit Police Division ride and patrol the TriMet system daily, assisting TriMet customers and enforcing TriMet Code and state laws. The bureau manages Transit Police for TriMet, which includes officers from 11 other local police agencies operating out of four TriMet Transit Police precincts. This task-force police model develops strong partnerships and allows for the closest available unit—whether with Transit Police or the local law enforcement agency—to respond to incidents on TriMet. All calls are coordinated through the regional 9-1-1 system for the quickest response. Transit Police also employs a crime analyst so it can quickly identify trends and shift strategies, putting Transit Police officers on the system in locations and at days/times where incidents are most reported. Along with Transit Police officers, TriMet supervisors and contracted Transit Security personnel keep watch throughout the TriMet system, riding the buses and trains and patrolling rail stations and transit centers. They provide a visible presence that discourages disruptive and inappropriate behavior while assisting riders who may need help navigating the system. This helps deter further crimes and increases safety for riders and employees.

Equity Impacts

Transit coordinates with the Citizens for Accessible Transportation (CAT) executive team, especially with respect to enforcement related to members of the public with mobility issues, and it trains with the CAT team to understand the perspectives of riders reliant on mobility devices. Crime analysis of data guides targeting of hotspot locations for saturation missions and studies whether they disproportionally impact particular geographies or populations. Deployment strategies are reviewed for equity, randomizing daily missions to avoid disparate impacts.

Traffic safety affects everyone in the City of Portland. Operational decisions by the Traffic Division take into account numerous communities disproportionately impacted by traffic violence within the city and are based on several considerations. Traffic receives ongoing community input and it participates in the Vision Zero Task Force, which brings together 25 community groups and organizations to collaborate on traffic safety and ensure that traffic safety resources are equitably applied.

Changes to Program

The Traffic Division has been reduced through operational and Council decisions starting in FY 2013-14 with the elimination of the night shift support, and further reduced with the required operational support for patrol operations due to the current staffing shortage. As the bureau is able to hire and train additional officers to assign to patrol, it expects that the performance indicators for the Traffic Division will improve as the unit is repopulated. The bureau does not expect to have enough officers to do so in FY 2019-20. Portland's contribution to the staffing of the Transit Police is likewise constrained by the availability of officers to fulfill the requirements of precinct patrol.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	95,580	34,600	0	0
External Materials and Services	1,448,675	1,401,047	2,238,259	1,490,300
Internal Materials and Services	2,399,504	2,799,784	2,475,545	3,127,348
Personnel	9,512,567	9,883,995	9,259,890	9,059,800
Sum:	**13,456,326**	**14,119,425**	**13,973,694**	**13,677,448**
FTE	70.83	69	66	66

Resources: The resources that support the Traffic Division come from a combination of General Fund discretionary funds, local recreational cannabis taxes, traffic enforcement grants, and fees and fines associated with photo enforcement citations. The Transit Police Division is funded by TriMet under the terms of the City's agreement with the transit agency.

Expenses: The primary expense of the traffic safety programs is for the personnel that staff them, which was 70% of total program expense in FY 2017-18. The remainder is for operating cost of vehicles, communications equipment, and for contract costs associated with the photo enforcement programs. All of this expense is variable, to the extent that it can be deployed to other bureau programs.

Staffing: The staffing is close to 90% sworn, with 20% being supervisory. The trend has been a reduction in staffing over the past five years.

Assets and Liabilities: There are no fixed assets associated with Transit. Traffic Division is housed in a City-owned facility. The principal City-owned equipment includes fleet vehicles and communications gear. Fleet and much of the communications gear has lifecycle replacement funding in place. Traffic Division replaces the remaining equipment from the operating budget. TriMet funds 100% of Transit lifecycle and operating budget equipment replacement expense.

Program Information

Bureau: Portland Police Bureau

Program Contact: ACs Chris Davis, Ryan Lee

Website: Traffic Division https://www.portlandoregon.gov/police/30559 ; TriMet: https://trimet.org/pdfs/publications/security.pdf

Contact Phone 503 823 0000

Chief's Office

Program Description & Goals

The Chief's Office provides the overall leadership and direction of the bureau. The core measurement of the Chief's Office performance is the bureau's progress in advancing its strategic plan, or Coggle as it is referred to at PF&R. Each of the five divisions has its own section of the Coggle. The plan is organized around specific tasks and goals that have been individually assigned to a staff member to ensure accountability in reaching that goal or completing that task by 2020. There are goals for every aspect of PF&R including emergency response, prevention, information technology, firefighter health and safety, finance, labor relations, equity, and outside partnerships.

The Coggle is managed monthly using scorecards. Every month the managers and executives meet to formally address sections of the plan to assure progress and support managers who may be struggling to make change. The use of the scorecard process is critical to the success of the program. Currently, 44 percent of the goals on the Coggle are complete.

PF&R tracks and monitors our employee demographics from the time of outreach and recruitment through the time of retirement. This has aided the bureau in identifying which populations are underserved in terms of employment opportunities within the fire services and how we can remove barriers and increase access for underserved populations. PF&R also monitors our promotional data, identifying and accounting for gaps in both people of color and women.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of civilian deaths due to fires	4	8	0	0	0
Time lost to on-duty injury (in full-time equivalent employees)	8.80	7.70	7.00	7.00	6.00
Percentage of Strategic Plan Objectives Completed	27%	35%	67%	67%	100%
Percentage of new sworn hires who are women	0	13%	15%	15%	20%
Percentage of new sworn hires from communities of color	16%	13%	20%	20%	30%

Explanation of Services

The Chief's Office provides overall vision, leadership, and management of PF&R. The Fire Chief provides direction for the bureau's four divisions: Emergency Operations, Prevention, Medical Services and Training, and Management Services. Additionally, the Fire Chief directly manages several core services within the Chief's Office:

--Communications and Outreach. The Communications section consists of five FTE that conduct media relations, provide strategic support to core leadership, manage PF&R's website and social media accounts, coordinate with City Council, and correspond with community groups.

--Recruitment. PF&R's Recruiter has primary responsibility for the recruitment, testing, and hiring of new firefighters. The Recruiter ensures that PF&R attracts a diverse workforce dedicated to the vision and mission of PF&R and the City of Portland. Along with Communications and the Public Education section in Prevention, the Recruiter plays an important part in PF&R's community outreach efforts.

--Equity. The Equity Manager serves as a member of the bureau's senior leadership and directly advises chiefs and managers on policies and decisions. The bureau has engaged with Portland State University on a cultural assessment study and the completion of PF&R's racial equity plan.

--Employee Assistance Program. This program provides support to PF&R staff, specializing in confidential counseling to help firefighters deal with the immediate and long-term emotional impact of the emergencies they encounter in the line of duty.

--Labor Relations. The Fire Chief works closely with the bureau's Human Resources Business Partner and the Professional Standards Deputy Chief on labor relations and human resources issues including discipline, working conditions, compensation, policy development and compliance, and labor grievances.

Equity Impacts

Former Fire Chief Mike Myers has recently directed some financial decisions to ensure that equity is a bureau priority. The bureau secured one-time funding to hire an Equity Manager and, per the directive of City Council, adjusted the PF&R base budget to ensure the on-going funding of this position. PF&R also contracted with Portland State University (PSU) to conduct a workplace cultural assessment and will continue to work with PSU to develop a racial equity plan.
Former
Chief Myers launched a program in 2017, called "Blueprints for Success." Former Chief Myers recognized that firefighters, by profession, solve problems. They also know their communities better than anyone else, are humanitarians at heart, and are in direct contact with the public every day of the calendar year. In short, he recognized that firefighters are in the best position to make the most impact on the communities they serve; this is especially true given that each fire station and the respective community they serve, is different from each of the others. Blueprints for Success opens the door for the free flow of ideas and solutions, empowering captains, lieutenants, and firefighters to have the authority and autonomy they have earned. Each fire station will develop a micro-plan to achieve the best results for the specific demographic nature of their community. Given that each fire station is able to develop their own micro-plan, they are able to employ strategies and techniques that are more equitable for those they serve in that they are not forced to limit their approaches to what is best for the larger whole, but for what will serve the needs of their specific community best. Blueprints for Success, while still in its early stages, is already changing the way we look at fire stations: we are neighbors serving neighbors. This program has led to increased partnerships with other agencies throughout the city, working together to ensure our residents, particularly those who have been historically underserved, receive the right services at the right time. Long term, these impacts are assessed through changes in our calls, meaning that overtime calls for services should go down.

Changes to Program

Through the leadership of the Chief's Office, the bureau has made several changes in FY 2018-19 to focus on organizational culture and climate. The bureau contracted with PSU to conduct a workplace cultural assessment and then translate the findings into measurable goals that will be integrated into the Coggle for completion. PF&R also recruited and hired its first Equity Manager, who was immediately placed on the bureau's senior leadership team. Lastly, through an internal realignment of existing positions, the bureau created a Professional Standards Deputy Chief. This new position is intended to solidify and standardize workplace policies while promoting an environment that supports positive coaching and accountability. PF&R is also participating in the Bureau of Human Resources' online performance review pilot project.

PF&R's Recruiter is implementing changes to PF&R's recruitment and testing process for the next firefighter hiring cycle, which will result in a new class of firefighter recruits in fall 2019. The new testing process will rely on a standardized written and physical agility test administered by an outside vendor. The new process will reduce the administrative cost and burden to PF&R while simultaneously allowing outreach to a wider applicant pool.

The City's current contract with the Portland Firefighters Association expires on June 30, 2019. Bureau leadership and BHR's Labor Relations team will be involved in bargaining throughout this year's budget process.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	155,852	492,714	327,448	385,028
Internal Materials and Services	104,491	178,981	-16,568	20,722
Personnel	971,040	1,180,078	1,259,792	1,462,312
Sum:	**1,231,383**	**1,851,774**	**1,570,672**	**1,868,062**
FTE	5.9	4.9	7.9	9.9

Resources: General fund discretionary resources support this program.

Expenses: 70 percent of the Chief's Office expected expenses in FY 2018-19 are for personnel costs. The Chief's Office has a small discretionary budget for external materials and services spending. In recent fiscal years, major discretionary spending has included the bureau cultural assessment completed by PSU, arbitration and legal fees associated with labor bargaining and grievances, and a one-time special appropriation to the David Campbell Memorial Association. The Chief's Office major discretionary expenses in FY 2018-19 will include legal fees, ongoing work with PSU on the cultural assessment, and potentially a consultant contract for polling on a general obligation bond to replace the bureau's Logistics, Training, and Prevention facilities.

Staffing:	The Chief's Office consists of 10 FTE, including the Fire Chief. The largest work group is Communications, and Outreach, which consists of 5 FTE including the bureau's Recruiter and Public Information Officer. The remaining three positions are individual contributors: the Equity Manager, the Professional Standards Deputy Chief, the EAP Coordinator, and the Chief's Executive Assistant.
Assets and Liabilities:	While the Chief's Office oversees the entire bureau, it is not directly responsible for the maintenance or replacement of any of the bureau's physical assets.

Program Information

Bureau:	Portland Fire & Rescue	**Program Contact:**	Fire Chief Sara Boone
Website:	https://www.portlandoregon.gov/fire/	**Contact Phone**	503-823-3700

Logistics

Program Description & Goals

Logistics provides critical support to Emergency Operations, ensuring PF&R is continually ready for 24/7 emergency response. Support from Logistics includes maintenance, repair, and procurement of fire facilities, apparatus, equipment and uniforms.

Logistics strategic plan highlights include re-opening Station 23; outfitting all firefighters with second set of turnouts; completing individual tap-out installations for double-company stations; Self-Contained Breathing Apparatus (SCBA) specifications and test; and preliminary work for an inventory system for uniforms, facilities, apparatus maintenance.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of frontline apparatus at or near end of useful life	33%	5%	18%	0	0
Percent of City Fleet vehicles allocated to FIre that are electric or hybrid.	0	N/A	0	25%	100%
Percentage of total spending on station supplies that is spent on green products.	0	N/A	0	50%	100%
Number of ADA barriers removed.	0	N/A	0	60	0

Explanation of Services

The Apparatus Maintenance staff is responsible for the maintenance and repairs of nearly 100 frontline and reserve apparatus, as well as a large array and volume of equipment and tools mounted or carried on apparatus. They are also responsible for the acquisition and replacement of apparatus, equipment, and tools. Emergency Vehicle Technicians perform preventative maintenance and repairs; outfit new apparatus; and provide 24/7 over-the-phone technical support to PF&R emergency response personnel. At second alarm or greater emergency events, EVTs are on scene to monitor apparatus and equipment and perform repairs when necessary.

The Facilities Maintenance staff maintains 31 stations and 5 support locations. They perform maintenance and repairs to building structures, mechanical systems, HVAC, electrical, plumbing, and appliances. They also repair and build furnishings and cabinetry. In addition, they supplement major remodeling projects and perform minor remodeling to fit the needs of the fire stations and other PF&R facilities.

The Station Operations staff is responsible for the purchase, warehousing and delivery of all materials, supplies and tools for all stations. They also purchase and provide uniforms and personal protective equipment for all sworn employees. In addition, coordinating with CityFleet, the Staff Captain manages PF&R's 133 non-apparatus City vehicles.

Logistics also manages apparatus replacement and station renovation projects funded by General Obligation bonds.

Equity Impacts

Logistics will work with the new Equity Manager and the bureau Equity Committee to develop and implement a five-year racial equity plan. Logistics will also address non-sworn focus group issues that arose out of the PSU workplace cultural assessment such as ineffective communication channels and division between sworn and non-sworn employees.

The Logistics team is also actively removing ADA barriers from PF&R's stations through positions supported in the base budget. PF&R removed 47 such barriers in FY 2017-18 and 109 since 2014.

Changes to Program

PF&R is engaged in a process to replace all SCBA and bring them to the most current standards to ensure the safety and health of firefighters. PF&R recently applied for and received an Assistance to Firefighters Grant of approximately $2 million, which will cover about two-thirds of the $3 million needed to fully fund the project. The balance will be funded by General Fund Capital Set-Aside resources allocated to PF&R in FY 2018-19. PF&R is currently engaging SCBA manufacturers in evaluation and testing of their SCBA equipment.

This program restored a carpenter position and added an electrician position in the Facilities Maintenance unit through realignment of existing resources in FY 2018-19, as the cost of the position is offset by a reduction in carpentry and electrician external contract costs. It is more cost effective to have in-house staff for these positions than it is to pay outside contractors.

Logistics contributes to the 1% reduction with energy savings from the installation of smart thermostats and LED bulbs; and lease savings from the boat slip purchase at Station 17.

PF&R has the following challenges in the Logistics program including funding gap for long term facility maintenance and replacement; Logistics and Prevention facility replacement; Training facility replacement; SCBA and turnout gear replacement. Please see Assets and Liabilities section for detailed explanation.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	429,210	3,429,000
External Materials and Services	0	0	0	5,404,519
Internal Materials and Services	0	0	0	3,296,766
Personnel	0	0	0	2,772,146
Sum:	**0**	**0**	**429,210**	**14,902,431**
FTE	0	0	0	23

Resources: This program is funded with General Fund discretionary resources.

Expenses: Logistics' external materials and services budget, which accounts for 39% of the Logistics expenditures, covers bureau-wide utilities and goods and services for the Logistics operations. The internal materials and services category, 17% of the program budget, pays for the CityFleet charges and the BTS charges related to the radio communication system. Capital outlay, 26% of the program budget, finances apparatus and equipment replacement, as well as major facility repairs projects. Personnel services, 18% of the programs budget, funds 24 positions at Logistics.

Staffing: Logistics consists of 23 FTE to provide the services described in the program services section including: a Deputy Chief and an office assistant for overall program management and support; 10 FTE in apparatus and equipment maintenance and repairs; 7 FTE in facilities maintenance and repairs; and 4 FTE responsible for managing non-apparatus City vehicles and purchasing and distributing uniform, turnout gear, and station operating supplies.

Assets and Liabilities:

Long-Term Facility Maintenance
PF&R does not have a major facility maintenance reserve funding mechanism for future maintenance and replacement costs. Based on current assets and approximate scheduled life-cycle replacement, there will be an estimated financial need of $1.13 million on average in annual major maintenance expenses in the not too distance future. The funds PF&R currently budgets for major facility maintenance and replacement are approximately $350,000 and can only cover the most urgent projects, resulting in a funding gap of $780,000 annually. If the maintenance funding gap persists, PF&R's facility capital assets would be inadequately maintained and inevitably deteriorate in the long run.

Logistics and Prevention Facility Relocation
The Logistics and Prevention facilities are located directly adjacent to the Clinton Station on the MAX Orange Line. The buildings are not structurally sound and do not meet seismic codes. They are overcrowded and deteriorating. The Clinton Triangle is identified as a significant opportunity for redevelopment to meet the Central City 2035 Plan objectives for affordable housing and job creation. The relocation of the Logistics and Prevention facilities would support these citywide objectives.

Training Center
The PF&R Training Center, located at NE 122nd and Sandy, is a combination of repurposed facilities and portable buildings with safety, sanitary, and operational issues. Like the Logistics and Prevention facilities, the Training Center does not meet current seismic codes and are overcrowded and in an inefficient layout. For example, the Training Academy for new firefighter recruits does not have running water, bathrooms, or adequate changing facilities. The burn building is showing signs of wear and degradation.

SCBA and turnout gear replacement
PF&R has made significant progress in protecting firefighters with SCBA and a second set of turnout gear with General Fund one-time resources and a federal grant. However, PF&R has insufficient ongoing funding to build up a reserve for their replacement when they reach the end of their useful life.

Apparatus
PF&R has 65 frontline apparatus and 33 reserve and training apparatus. In 2010, Portland voters approved a $72.4 million Public Safety GO Bond measure to fund replacement of fire apparatus, construction of a fire & rescue station, construction of an emergency coordination center, and replacement of the City's public safety radio system. The 2010 GO bond measure allocated $19.8 million for the purchase of eleven Engines, four Trucks, two Quints, two Fireboats, one Heavy Rescue, Four Rapid Response Vehicles (RRVs), and seven pieces of other specialty apparatus. As such, most of the apparatus at present are in good or fair condition. In addition, PF&R has accumulated an apparatus replacement reserve of approximately $7 million, which will be used to supplement the current ongoing budget to meet PF&R's apparatus replacement needs for the next 12 to 14 years.

Program Information

Bureau:	Portland Fire & Rescue	**Program Contact:**	Deputy Chief Bill Goforth
Website:	https://www.portlandoregon.gov/fire/	**Contact Phone**	(503) 823-3700

Business Operations

Program Description & Goals

Business Operations manages PF&R's financial resources and ensures compliance with the City's financial, procurement, and other administrative policies, procedures, and guidelines. It also provides a broad range of management, administrative, and support services for the bureau including strategic planning coordination and reporting; budgeting, accounting and grant management; personnel actions and payroll processing; contracts and procurements; data analysis and performance measurement; information technology support and coordination; special projects and administrative services.

Business Operations strategic plan highlights include completing high-speed data connections to stations; applying and receiving a federal grant for SCBA replacement; launching the Blueprints for Success initiative; starting contract and implementation of fire inspection software; streamlining the General Orders update process; and preliminary work on Logistics/Prevention/Training facilities replacement.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of outside grants received.	0	N/A	0	$429,000	0
Percent of contracts awarded to vendors with Oregon's Certification Office for Business Inclusion and Diversity (COBID).	0	N/A	0	30%	50%

Explanation of Services

The Finance staff ensures compliance with the City's financial, procurement, and other administrative policies, procedures, and guidelines. The Finance staff coordinates budget development and monitors budget execution. They also provide accounting, contracting, purchasing, and grant management services. In addition, this section handles Council document filing, personnel actions, FLMA coordination, and payroll processing.

The Performance and Data Analytics staff provides data analysis and statistical research including reporting on performance measures, the strategic plan scorecard, and maps for the bureau. This section is also responsible for coordinating the Blueprints for Success initiative implementation.

The Special Projects and Administrative Services staff provides strategic planning coordination and reporting and prepares the annual performance report. This section is responsible for ensuring that the bureau's General Orders and Operational Guidelines are frequently updated. Additionally, this section manages PF&R's telecommunications and mobile devices program, fire code appeals process, user guide updates, and provides general administrative support and customer services.

The Information Technology staff works with the Bureau of Technology Services (BTS) to provide IT support and coordination including the day-to-day technology needs of 31 fire stations and 5 other PF&R facilities as well as large software projects. Additionally, BTS dedicates 3 FTE for software application services.

Equity Impacts

PF&R realigned ongoing resources to fund a permanent Equity Manager position. PF&R also contracted with Portland State University (PSU) to conduct a workplace cultural assessment, on which PF&R is developing a five-year racial equity plan.

Business Operations will work with the new Equity Manager and the bureau Equity Committee to develop and implement a five-year racial equity plan. Business Operations will also address non-sworn focus group issues that arose out of the PSU workplace cultural assessment such as ineffective communication channels and division between sworn and non-sworn employees.

Business Operations uses the Oregon COBID (Certification Office for Business Inclusion and Diversity) system to expand contracting opportunities for disadvantaged, minority, women, and emerging small businesses (D/M/W/ESB). In the last three years, PF&R awarded 32% of its contract dollars to COBID vendors.

Changes to Program

PF&R believes the growing call volume for emergency response is symptomatic of broader communitywide issues related to quality of life and livability. The Blueprints for Success initiative is a framework that challenges PF&R to seek new ways and new partners that can help the bureau address community-based issues surrounding racial equity, mental health, public health, access to housing or other resources, and community safety. While this initiative started with PF&R, the intent is to make this a citywide collaboration and to involve external partnerships to the greatest extent possible.

PF&R is currently in the process of applying for accreditation through the Center for Public Safety Excellence. Accredited agencies are often described as being community-focused, data-driven, outcome-focused, strategic-minded, properly equipped, and adequately staffed and well trained. Accreditation is an international recognition of achievement. It shows to the community that the agency is performing to industry best practices and is holding itself accountable through an external peer review.

Technology Upgrades:
• CrewSense - PF&R is currently implementing the CrewSense staffing and scheduling software application solution. This project will provide firefighters with updated schedule information via a web portal. In addition, the CrewSense application will streamline and improve staff scheduling for vacation, sick leave, replacement overtime, and other various details.
• CivicGov - PF&R is working on a contract for a new software application for fire inspections. The new system will replace the current 20-year old system, and will enable on-site inspection access and data entry, risk-based prioritization, and efficient scheduling of inspections. This project will go live approximately Spring 2020.
• Improving Data Connections to Stations and Apparatus - PF&R applied and received a grant from Mt. Hood Cable Regulatory Commission to install high-speed internet to all stations. PF&R is now undergoing additional projects to connect the Mobile Data Computers (MDC) to the City's network and install Wi-Fi at stations. Connected MDCs will be updated more frequently to provide firefighters with more current building information and improve emergency response effectiveness and firefighter safety. Wi-Fi in stations will also allow for training videos to be viewed by firefighters on mobile devices such as iPads and iPhones at stations.

Business Operations contributes to the 1% reduction by securing a $55,000 ongoing revenue by licensing PF&R's current Fire Information System to Portland Airport Fire & Rescue; switching pager messaging to cellphone texting; eliminating landlines for employees with cellphones; and reducing the timekeeping specialist to 0.75 FTE.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	305,273	775,072
Internal Materials and Services	0	0	0	3,914,081
Personnel	0	0	0	2,128,811
Sum:	**0**	**0**	**305,273**	**6,817,964**
FTE	0	0	0	16.65

Resources: This program is funded with General Fund discretionary resources.

Expenses: Business Operation's internal materials and services comprises 57% of this program's budget. Expenses of internal services provided by Risk Management and BTS are housed in this program for the entire bureau.

Staffing: Business Operations consists of 17 employees to provide the services described in the program services section including the Management Services Division Manager. There are 9 FTE in finance; 3 FTE in special projects and administrative services; 3 FTE in performance and data analytics; and 1 FTE in information technology coordination. This program also pays BTS for 3 application analysts dedicated to PF&R (not included in PF&R's FTE total).

Assets and Liabilities: This program does not own or operate any assets, however, it does oversee the bureau's assets from a procurement, finance, and management perspective

Program Information

Bureau: Portland Fire & Rescue

Website: https://www.portlandoregon.gov/fire/

Program Contact: Division Manager Jay Guo

Contact Phone (503) 823-3700

Medical Services & Training

Program Description & Goals

Medical Services & Training provides several services to the public and internally to PF&R. One essential issue is training and safety. The division makes sure that firefighters have adequate training and certifications to operate safely and effectively. All training and certifications are logged into PF&R's training database.

The Emergency Medical Services (EMS) is responsible for PF&R's performance on medical incidents. The Continuous Quality Improvement Committee reviews responses to ensure medical services are provided effectively and equitably. The program also provides outreach to homeless individuals and high utilizers of the 9-1-1 system. The section can clearly demonstrate the effectiveness of its outreach efforts by tracking reductions in the use of 9-1-1. This section is also focusing on firefighter health and wellness, convening a Wellness Fitness Initiative work group with a focus on many activities from peer support to immunizations to healthy diets.

The Training Academy will train between 12 and 36 new firefighters each year depending upon the bureau's staffing needs.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of new recruits who complete Academy training and probation	84%	80%	100%	100%	100%
Hours of in-service training per sworn employee	93	154	105	105	120

Explanation of Services

Medical Services and Training supports several internal and external functions for PF&R. The division is divided into the following sections:

In-Service Training: In-Service Training supports a safe working environment for all PF&R employees by ensuring that they have the knowledge, skills and abilities to perform their jobs safely and effectively. These activities range from in-service training on new techniques and equipment to on-going training to meet recertification requirements for state and federal agencies.

Training Academy: The Training Academy provides new firefighters with the academic knowledge and physical skills needed to perform their jobs safely. Firefighters who successfully complete the academy transition to an active fire station where they are closely supervised and receive on-the-job experience.

Emergency Medical Services: The EMS section provides oversight and management of the training, certifications, policies, and procedures necessary to function as EMS first responders. EMS also oversees PF&R's health and wellness program for firefighters.

Television Services: This group maintains a live television studio and develops in-house training videos, which allows and supports in-service training and communication to occur within the fire stations while the crews remain in service. In addition, TV Services' programming serves as an important communications vehicle from PF&R's leadership to all bureau personnel.

Equity Impacts

The Medical Services & Training Division provides quality assurance to ensure equitable emergency medical service across the city. PF&R is committed to providing high-quality service on every call and meeting the needs of those calling 9-1-1.

The Community Healthcare Manager, permanently funded in FY 2018-19, functions as a liaison between PF&R and community partners with a focus on improving overall population health. This position is responsible for providing medical outreach to Portland's most vulnerable residents, including high utilizers of 9-1-1.

Changes to Program

The FY 2019-20 Adopted Budget provides one-time funding for a non-sworn Health and Wellness Coordinator position. The position will plan, organize, coordinate, and direct the bureau's health and wellness program including medical, fitness, and rehabilitation. Additional responsibilities include maintaining a database for all occupational health activities and providing annual occupational health testing for firefighters.

The Community Healthcare Manager position was permanently funded in FY 2018-19 and continues to work on community outreach, the high utilizer program, and community education. This includes a strategic focus on engagement with and delivery of appropriate healthcare to persons experiencing homelessness. The main strategy in this program is the development and deployment of a mobile health or harm reduction vehicle to homeless individuals to provide care or connect individuals to the appropriate services.

PF&R, working with American Medical Response (AMR) and the Multnomah County EMS office, was able to procure a mobile electronic patient care report program via the ambulance service contract. This was done at no cost to the City and will reduce workload by multiple hours per day for report writers.

Medical Services & Training, through consultation with Multnomah County, initiated a pilot project in 2018 to reduce its responses to AB3 calls (medium-to-low acuity abdominal pain) and BK3 calls (medium-to-low acuity back pain). These calls, which rarely result in an emergency trip to the hospital, are now responded to with only an ambulance rather than the traditional dual response of a PF&R apparatus and ambulance. Medical Services and Training is also supporting the Bureau of Emergency Communications' efforts to implement Medical Priority Dispatch and a nurse triage system, which is a key long-term strategy for managing call volume.

PF&R continues to utilize Target Solutions, an online training platform, which allows firefighters to stay in their station and receive the instruction online via mobile tablet. This has decreased the amount of time that firefighters and their units are out of service for training, thus helping to decrease PF&R's response times.

In the FY 2018-19 Adopted Budget, City Council approved a new fee program for lift assists. The fee policy will deter facilities from relying on PF&R and the EMS system for lift assists and encourage them to have alternative arrangements. The policy change should reduce the number of lift assists that PF&R must respond to, improving several performance measures. PF&R implemented the program in spring 2019 and will report on results early next fiscal year.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	34,605	133,864	114,296	75,000
External Materials and Services	750,256	909,432	1,080,213	1,015,099
Internal Materials and Services	252,226	234,812	58,696	78,480
Personnel	5,541,300	5,147,387	3,967,338	4,332,344
Sum:	**6,578,387**	**6,425,496**	**5,220,543**	**5,500,923**
FTE	34	33	28	32

Resources: Medical Services & Training is largely supported by discretionary General Fund resources. The division, however, does receive reimbursement through the County's ambulance service agreement for some EMS costs. This includes about $300,000 in reimbursement for medical supplies and $75,000 for medical training.

Expenses: Approximately 80 percent of expenses are for personnel costs. The division spent approximately $900,000 on external materials and services in FY 2017-18, largely to purchase medicine and medical supplies and also for certifications, professional development classes, and to pay for outside instructors to provide in-house training.

Staffing: Medical Services & Training has 33 FTE including the Division Chief. There are 12 firefighter positions for new recruits in the Training Academy, plus an additional four sworn FTE that are the Training Academy's instructors. EMS has four sworn FTE and two non-sworn FTE. An additional seven sworn FTE and two non-sworn FTE support in-service training and the division's administrative functions. The FY 2019-20 Adopted Budget adds a limited-term, non-sworn Health & Wellness Coordinator position.

Assets and Liabilities: Medical Services & Training relies on Logistics to maintain the Training Facility and the reserve apparatus used for training purposes. As described in the Logistics' section, the Training Facility has several deficiencies and needs to be replaced. One specific issue of concern is the potential contamination of groundwater on the site. This is currently undergoing testing, but could become a liability for PF&R.

EMS also procures and maintains medical equipment for responses and exercise equipment for firefighter health and wellness.

Program Information

Bureau: Portland Fire & Rescue

Website: https://www.portlandoregon.gov/fire/

Program Contact: Division Chief Sara Boone

Contact Phone (503) 823-3700

Emergency Operations

Program Description & Goals

The primary mission of Emergency Operations is to protect life, property, and the environment. The 2017-20 Strategic Plan (Coggle) identifies several initiatives for Emergency Operations that are directly tied to PF&R's mission:

• Zero fire deaths

• Increase response reliability and decrease out-of-service time

• Zero firefighter casualties (deaths and injuries resulting in hospital stay)

• Zero traffic fatalities - joining forces with public and private partners to eliminate all traffic-related deaths and make Vision Zero a reality.

The Coggle includes ambitious targets to help achieve the above goals by 2020: 80 seconds or less in turnout time to 90% of high-priority calls, 90% of structure fires confined to room of origin, and ensuring 90% of all traffic preemption devices are working.

The key performance measure that indicates the success of Emergency Operations is response time. Arriving quickly to an incident is the most effective way to prevent the spread of fire or provide critical medical interventions. PF&R's goal is to respond to high-priority calls within 5 minutes and 20 seconds. In FY 2017-18, PF&R met this goal on 60.6% of high-priority incidents, up from 57.4% in FY 2016-17. Similarly, PF&R responded to 90 percent of high-priority incidents in 7 minutes and 19 seconds or less in FY 2017-18, an improvement of roughly 20 seconds over FY 2016-17.

It is important to note that PF&R has improved upon its response time performance even as call volume and workload continue to increase. PF&R responded to more than 87,000 emergency incidents in FY 2017-18, a 7.5% increase over just two years. Over 108,000 unit responses were needed in FY 2017-18 to respond effectively to the 87,000 incidents, as multiple apparatus (units) are required at complex and dangerous emergencies.

There are essentially two strategies for improving response times. The first strategy is to increase resources, such as building more stations or adding more response units to existing stations. The second strategy is to improve efficiency in the emergency response system. Recognizing the fiscal constraints of the City's General Fund, PF&R has focused exclusively on finding efficiencies as opposed to opening new stations. For example, PF&R was able to reopen Station 23 in 2017 through an internal realignment of resources that did not result in additional costs to the City. This has improved response times in the inner southeast. PF&R also implemented Automatic Vehicle Locator (AVL), which utilizes GPS to dispatch the closest available apparatus to each incident. Additionally, PF&R is looking for ways to manage the growing call volume. The bureau, through consultation with Multnomah County, initiated a pilot project in 2018 to reduce its responses to AB3 calls (medium-to-low acuity abdominal pain) and BK3 calls (medium-to-low acuity back pain). These calls, which rarely result in an emergency trip to the hospital, are now responded to with only an ambulance rather than the traditional dual response of a PF&R apparatus and ambulance. The bureau fully supports the Bureau of Emergency Communications' efforts to implement Medical Priority Dispatch and a nurse triage system, which is a key long-term strategy for managing call volume.

The bureau is also making efficiency improvements to reduce firefighter workload and increase the

time available for emergency response. For example, through participation in the negotiations for the ambulance service agreement between Multnomah County and American Medical Response (the county's ambulance provider), PF&R is implementing a mobile, electronic patient care reporting system. The bureau has also implemented Target Solutions, an online training platform that allows units to remotely view trainings while staying in service.

The City of Portland had 8 fire deaths in FY 2017-18. PF&R continues to work towards its goal of zero fire deaths. The Fire Chief has convened a Zero Fire Deaths Task Force and PF&R is researching innovative ways to identify fire risks in commercial and residential properties.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of incidents	85,698	87,166	90,500	91,000	80,000
Percentage of structural fires where flamespread was confined to room of origin	70%	73%	75%	75%	90%
Percentage of responses (turnout and travel) to Code 3 incidents within 5:20	57%	61%	62%	62%	90%
Number of civilian deaths due to fires	4	8	0	0	0
Response time to high-priority incidents at 90th percentile	7.39	7.19	7.15	7.15	7.15
Time lost to on-duty injury (in full-time equivalent employees)	8.80	7.70	7.00	7.00	6.00
Percentage of high-priority responses with a turnout time of less than 80 seconds	61%	61%	65%	65%	100%

Explanation of Services

The Emergency Operations Division is responsible for providing fire, medical, and other emergency incident response. Emergency response is PF&R's primary mission and the most critical and visible service the bureau provides to the community.

The Emergency Operations Division has 169 firefighters operating 24 hours a day, 365 days a year out of 31 fire stations strategically located across the city to ensure fast response times to emergency incidents.

In FY 2017-18, PF&R responded to 12,180 calls reporting fire conditions or a suspicious fire situation (alarms, smoke in area, etc.). Of these reported fires, 3,283 were actual fires requiring extinguishment. It is imperative that PF&R respond quickly to effectively handle any reported fire threat before it grows exponentially to threaten more lives and property.

As an efficiency to taxpayers, all emergency response firefighters are certified as Emergency Medical Technicians, with approximately 160 of these members certified as Paramedics. This configuration allows PF&R to provide Advanced Life Support (ALS) from each of its 31 fire and rescue stations. Medical incidents comprise approximately 70% of all emergency responses.

In addition to the main staffing of engines and trucks, specialty apparatus—for example, fireboats, brush units, water tender—are also available for emergency response. Specialty programs include technical rescue, marine program, search and rescue, and hazardous materials. Cross-trained personnel staff each specialty apparatus in addition to the station's engine or truck, switching from one to the other as needed.

The division also includes the safety arm of the bureau, which is committed to providing preventative measures to keep firefighters healthy and safe, and to prevent line-of-duty injuries or deaths. Activities include reviewing all injuries and accidents, providing consistent comprehensive strategy and tactics training, and assuring compliance with the Occupational Safety & Health Administration (OSHA).

The Special Operations section of the division plays a critical role in emergency response, working with other bureaus, and strategic planning. The section includes a liaison with the Portland Bureau of Emergency Management who coordinates staffing plans (and reimbursement) for special events. The section works closely with the Portland Bureau of Transportation to ensure PF&R has input on street design changes that might affect emergency response. The section has also taken a lead role in PF&R's grant application for wildland fuels reduction in Forest Park.

Equity Impacts

PF&R provides 24/7 fire and rescue services from a network of 31 neighborhood stations strategically located throughout the city. Each of the 31 stations serves a designated Fire Management Area (FMA). A recent analysis by Hack Oregon showed PF&R's response times are equitable across the city with no apparent bias regarding population density, average income, or racial makeup of neighborhoods. Rapid Response Vehicles (RRVs) are located at four of the stations, and generally focus on lower-acuity healthcare or public assist calls. The areas served by the RRVs include many vulnerable populations, as they tend to have a higher proportion of communities of color, lower income households, and more residents without a college degree than the city's average rate.

PF&R's base budget supports translation, interpretation, and ADA accommodation as needed, primarily in public education and outreach. The budget includes resources for translation and interpretation as needed by the emergency operations teams; each apparatus has an attached iPad that allows users to access on-demand translators and interpreters when required during emergency calls.

PF&R has developed a partnership with Portland State University (PSU) on an initiative called Blueprints for Success. In short, this initiative examines the subcommunities throughout Portland to identify strategies to improve services and outcomes for each community. PF&R's goal is to tailor our response, prevention, and education efforts to match the individual needs of each community before they become worse-case scenarios where a 9-1-1 call must be made. This program has led to increased partnerships with other agencies throughout the city, working together to ensure our residents, particularly those who have been historically underserved, receive the right services at the right time. Long term, these impacts are assessed through changes in our calls, meaning that overtime calls for services should go down.

Changes to Program

PF&R is constantly reviewing its response model and dispatch protocols. For example, in the past year, Emergency Operations has changed the station assignments of its Rapid Response Vehicles (RRVs) to respond to growing call volume in east Portland. As described above, the bureau has also changed its dispatch protocols to certain lower acuity calls in an effort to manage call volume.

The FY 2019-20 Adopted Budget eliminates two fire fighter positions from Emergency Operations. This reduces Station 23's service level to an RRV on all three shifts. Currently, PF&R operates a four-person engine out of Station 23 on one shift and a two-person RRV on the other two shifts. PF&R closed Station 23 in 2010 but was able to reopen the station in November 2017 by reassigning an RRV there. Station 23 became the only PF&R station operated with only a two-person crew. Then, PF&R reached an agreement with Gresham Fire to operate a two-person RRV out of Station 31 in 2018 to address the growing call volume in that area. This "freed up" two PF&R fire fighters because Gresham staffs the Station 31 RRV on one shift. Recognizing the need for additional fire protection at Station 23, these two positions were assigned to Station 23 so that the bureau could begin operating an engine company on one shift. This reduction will mean that the engine company now runs as an RRV, similar to other shifts at Station 23.

PF&R is taking a leadership role locally and across the state in preparing for and fighting wildland fires. PF&R's responded to 14 requests for support from the Oregon State Fire Marshal for wildland fires in Oregon and California in 2018. Participating in these emergencies provides valuable experience for PF&R's officers and firefighters. With the growing threat of climate change, PF&R must be prepared for potential fires in the wildland urban interfaces around Portland, particularly Forest Park. PF&R is currently partnering with the Parks Bureau on a grant for a pilot project to reduce fuels in a small section of Forest Park. PF&R is also working with state partners on a project to improve education in Portland regarding defensible space and fire wise communities.

The bureau is in the process of updating its staffing software. PF&R relies on a dated system that requires firefighters to call in and results in supervisors spending significant time focused on daily staffing decisions. The new software will automate many staffing functions, allowing frontline chiefs to focus more on operations and other critical matters.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	-225,355	202,406	266,517	189,860
Internal Materials and Services	114,769	111,638	69,171	58,363
Personnel	79,758,371	84,309,586	90,016,879	89,755,320
Sum:	**79,647,785**	**84,623,630**	**90,352,567**	**90,003,543**
FTE	586	590	592	587

Resources: General Fund discretionary resources support most of the Emergency Operations Division's regular activities. The Bureau of Fire & Police Disability & Retirement (FPDR) reimburses PF&R for the retirement contributions of sworn Oregon Public Safety Retirement Program (OPSRP) participants and supports half the cost of PF&R's FPDR liaison. The State of Oregon reimburses PF&R for the costs associated with deployments to wildfire and hazardous materials incidents. Wildland fire deployments have been a significant overtime cost for the bureau in recent years and the state reimbursement fully covers this expense. PF&R also receives reimbursement for the planning and overtime costs associated with special events such as the Portland Marathon and Oregon Brewers Festival.

Expenses: Emergency Operations is the largest division and typically accounts for about 70 percent of the bureau's overall General Fund budget. About 99 percent of the Emergency Operations Division's expenses are for personnel costs. Support expenses (apparatus, station operations, and facility maintenance) are largely accounted for the in PF&R's Logistics section, so non-personnel expenses are limited in Emergency Operations.

Fluctuations in Emergency Operations' personnel expenses are largely driven by overtime. PF&R must maintain on-duty staffing at all 31 fire stations. When employees are out on leave, PF&R backfills employees with firefighters from the traveler pool or firefighters on overtime. The traveler pool does not have enough positions to cover every vacant shift so there are usually overtime shifts every day. Increased leave usage, including the City's expanded paid parental leave policy, has put additional stress on PF&R's overtime budget. Despite these stresses, however, PF&R has managed to limit growth in non-reimbursable overtime by maintaining the traveler pool size and limiting discretionary overtime. PF&R's non-reimbursable overtime costs have largely been steady since FY 2015-16. (Increased deployments to state wildfires have increased PF&R's overall overtime expenses, but this cost is entirely reimbursed by the state.)

Staffing: Emergency Operations is the largest division within PF&R with 587 FTE. The division includes 4 Deputy Chiefs, 14 Battalion Chiefs, 32 Captains, 109 Lieutenants, 10 Harbor Pilots, and 417 Fire Fighters. Most of these positions are frontline on-duty personnel working 24-hour shifts out of PF&R's 31 fire and rescue stations. The division has nine staff positions supporting station staffing, emergency management, dispatch coordination with the Bureau of Emergency Communications, safety and injuries, and special operations.

Assets and Liabilities: Emergency Operations relies on 65 frontline apparatus, 33 reserve and training apparatus, and specialized safety and rescue equipment while operating out of PF&R's 31 stations. These assets are mostly procured and maintained by PF&R's Logistics section. It is important to note, however, that a key element of PF&R's asset management plan is the work firefighters complete every day to maintain the apparatus, equipment, and stations in operating condition.

Program Information

Bureau:	Portland Fire & Rescue	**Program Contact:**	Division Chief Tom William
Website:	https://www.portlandoregon.gov/fire/	**Contact Phone**	503-823-3700

Prevention

Program Description & Goals

The goal of the Prevention Division is to save lives, property, and the environment by preventing fires before they start, and to identify the cause and origin of fires. Under the direction of the Fire Marshal, the Prevention Division works to reduce the frequency and severity of fires and other life-safety incidents through a multi-disciplinary approach that includes education, engineering, and enforcement. The Coggle identifies several initiatives for the Prevention Division, many of which support PF&R's goal of zero fire deaths and zero neighborhoods neglected. These initiatives include:

• Implement community risk reduction program called Blueprints for Success by fire management area.

• Implement new innovations in fire prevention such as new fire inspection software and mobility.

• Reduce time to complete fire inspections, plan review, and arson investigations.

Prevention's performance measures focus on its ability to provide services in an effective and timely manner. For example, turning around plan review documents quickly is essential to the City's goal of accelerating housing development. PF&R is also dedicated to inspecting high-priority occupancies at least once every two years and promptly following up on violations with reinspections. Improvements in these areas are driven partly by staffing, but also by identifying efficiencies. A major efficiency project in Prevention is a new software project in Code Enforcement, which is described in more detail below.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of high-hazard inspections completed within 27 months	67.00%	65.00%	85.00%	85.00%	100.00%
Number of plan review and permits	8,690	9,001	8,850	8,850	9,000
Percentage of plan reviews completed within turnaround goals	80%	92%	95%	95%	100%
Number of code enforcement inspections	21,277	23,386	23,000	18,000	18,000
Number of code enforcement reinspections	5,145	6,331	6,500	6,500	5,000

Explanation of Services

The Prevention program is responsible for reducing the number of fires, fire deaths, and injuries occurring annually in the city, particularly among those populations that face disproportionately high risk of death due to fire. PF&R is designated by the Oregon State Fire Marshal as an exempt jurisdiction as defined in ORS476.030 (3). With this authority, PF&R performs, with few exceptions, all of the activities assigned by Oregon law to the State Fire Marshal.

The Prevention program is comprised of the following sections: Plan Review, Permits and Public Assembly, Code Enforcement, Harbor Master, and Fire Arson and Investigation.

The Plan Review section evaluates construction and development plans for compliance with fire and life safety codes, issues trade permits, and reviews plans for installation of suppression systems and fire alarm systems.

The Special Use Permits section reviews and completes plans and permits; inspections for special events, shows, VIP events, festivals and seasonal events; inspections for after-hours public assembly (nightclub) safety program to prevent overcrowding and blocked exits; and plans, permits, and inspections for tanks, piping and processing involving hazardous materials, fueling, blasting, pyrotechnics, fireworks, and other high-risk activities.

The Code Enforcement section identifies and mitigates fire hazards in commercial buildings, multi-family housing of three or more units, and marine-related operations. The section provides fire and life safety inspections every two years for commercial, multi-family residences (three or more units), and institutions (schools, hospitals, jails).

The Harbor Master section is charged by City Code Title 19 with providing inspection of wharves, docks, landings, vessels, and watercraft. The Harbor Master partners with the United States Coast Guard, the Oregon State Marine Board, Multnomah County, the Port of Portland, and commercial ventures having an interest in the Willamette and Columbia Rivers.

The Fire Arson and Investigations section is responsible for determining origins and causes of fires, explosions, and other emergency situations. Investigators are dually certified as law enforcement officers and firefighters, and work cooperatively with other law enforcement agencies to investigate fires and explosions at a regional level.

Equity Impacts

PF&R's public education efforts include intervention to Portland's must vulnerable and least accessible populations, specifically children and the elderly. Partnerships with local schools and senior organizations provide direct outreach and education. In addition, Community Safety home fire checklists have been translated into ten different languages, and smoke alarms are available for the deaf and hearing impaired.

As part of meeting the 1 percent budget constraint, PF&R is implementing code enforcement free changes to achieve 5 percent revenue growth. As noted below, PF&R is analyzing alternatives to an across-the-board fee increase, specifically to ensure the fee changes do not disproportionately affect certain types of businesses or geographic areas.

Changes to Program

The FY 2018-19 Adopted Budget provided $350,000 in funding for a new fire inspection software to improve Code Enforcement operations. The new software will allow inspectors to access information and enter data in the field, provide a customer portal for access to fire inspection data, and prioritize inspections based on risk. Procurement and product development is in progress, and PF&R's goal is to launch the software in FY 2020-21.

The Prevention Division is also work closely with a researcher from Harvard on a new system for fire risk modeling. The new model will allow PF&R to better identify which buildings have the greatest fire risk. This information will allow Prevention to improve its inspection and public education efforts to focus on the highest risk buildings and most vulnerable populations.

Prevention's FY 2019-20 base budget increases Code Enforcement's fee revenue target by 5 percent. The increase nets about $95,000 in ongoing revenue, and is one strategy PF&R identified for operating within the 1 percent budget constraint without reducing services. Rather than a general across the board fee increase, Prevention is analyzing alternatives such as changing exemptions or discounts to meet the increased revenue target.

Other reductions and efficiencies identified within Prevention's BY 2019-20 base budget to align expenses with the one percent budget constraint include:

-- $20,000 in additional revenue from Prevention's false alarm policy. In the FY 2018-19 Adopted Budget, PF&R adopted a new fine policy for repetitive false alarms. The program has yielded more revenue than expected in its first year of operation.

--$10,500 in reduced overtime through the reduction of illegal fireworks enforcement over the July 4th holiday.

--$12,500 reduction in Public Education's budget for promotional materials and sponsorships.

--$7,000 in identified savings through improvements in procurement practices to take advantage of bulk pricing in smoke alarm purchases.

--Like other divisions, Prevention has reduced the number of phone lines and pagers as PF&R transitions to newer mobile technology.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	310,826	348,615	325,463	313,942
Internal Materials and Services	463,671	469,234	271,257	257,688
Personnel	7,512,042	8,258,486	7,974,919	8,355,575
Sum:	**8,286,539**	**9,076,336**	**8,571,639**	**8,927,205**
FTE	58	59	61	58

Resources: PF&R projects that the Prevention Division will generate approximately $4.5 million in revenue in FY 2019-20. This revenue is derived mainly from cost recovery fees from Plan Review, Code Enforcement, and Special Use Permits.

Plan Review fees are derived from the evaluation and inspection of development plans and construction for compliance with fire and life safety codes. These fees are intended to cover 100% of the program costs. Plan Review fee revenue is projected at $2.3 million in FY 2019-20. Plan Review revenue is driven by new construction activity in the city. Consistent with projections from the Bureau of Development Services, PF&R expects Plan Review revenue to slightly decrease in FY 2019-20 as construction activity slows.

The Code Enforcement fees are associated with the identification and abatement of fire hazards in commercial buildings, institutional occupancies such as schools and hospitals, multifamily housing of three or more units, and marine-related operations. Code Enforcement's goal for cost recovery is 50 percent of expenses with fee revenue projected at $1.5 million in FY 2019-20. As described above, PF&R expects Code Enforcement revenue to increase in FY 2019-20 as part of the bureau's strategy for meeting the 1 percent reduction constraint.

The Special Use Permit Program is responsible for permits and inspections for special events such as trade shows, festivals, concerts, banquets, outside tents, and nightclubs. The program also issues permits and inspects tanks, piping, and processes involving hazardous materials, fueling, blasting, pyrotechnics, fireworks, and other high-risk activities. Currently, the fees fund 100% of the program costs with revenue projected at $630,000 in FY 2019-20.

Expenses: Personnel expenses make up about 90 percent of Prevention's budget. The division has some discretionary resources for employee training and development as well as public education materials.

Staffing: The Prevention Division is composed of 49 sworn staff and 9 nonsworn support staff. Fire Marshal Nate Takara is the head of the division. Most of the sworn staff are Inspectors, a rank requiring additional training and certifications beyond the firefighter position. Direct supervision is generally provided by Senior Fire Inspectors. The Deputy Fire Marshal leads the Code Enforcement, Special Use Permits, and Harbor Master sections. The Fire Protection Engineer leads the Plan Review section. The Fire Arson and Investigation section is composed of 6 Investigators who are dually certified as law enforcement officers and firefighters.

Assets and Liabilities: As noted in the Logistics' section, Prevention's office space requires significant upgrades and will need to be relocated to allow for the development of the Clinton Triangle area. The Prevention Division utilizes sedans for inspections, which are procured and maintained by City Fleet. Prevention and the Bureau of Technology Services currently maintain PF&R's inspection system, which contains all building records, inspection, and violation history. As described above, PF&R is currently investing in new software from an outside vendor to replace the inspection software.

Program Information

Bureau:	Portland Fire & Rescue	**Program Contact:**	Fire Marshal Nate Takara
Website:	https://www.portlandoregon.gov/fire/	**Contact Phone**	(503) 823-3700

Administration & Support

Program Description & Goals

The primary purpose of the Administration and Support program is to provide executive leadership and bureau wide support for the other bureau programs. This program includes the bureau Director's Office, public information, equity committee, human resources (HR), procurement, accounting, grants management, finance, and administrative support functions within the bureau.
The bureau's current strategic plan will expire in December 2019. The bureau will complete a strategic plan process to create a FY 2020-2023 strategic plan.
The U.S. Congress has mandated changes to the wireless emergency alerts (WEA) program that may make the PublicAlerts registration goal obsolete. Therefore, the KPM around PublicAlerts registrations will likely be archived and the strategic target is set at zero in future years.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of bureau strategic plan objectives achieved or in progress	90%	75%	87%	90%	90%
Number of new PublicAlerts registrations	3,678	6,228	5,000	5,000	5,000

Explanation of Services

This section maintains the bureau's financial integrity. This is done through administrative support and oversight, budget development, accounting, expenditure monitoring, financial reporting, human resources, and grant administration.
When this support program is functioning well every other bureau program benefits. Many of the functions in this program are highly dependent on coordination with the related central service providers. The primary resource used in this program are employees. Currently, employees within this program don't track their time between the different activities they perform, therefore it is difficult to create a direct cost vs. benefit argument for this program. Historically, we at PBEM have not created performance indictors around many of the services in this program, as they are so dependent on central service providers and many of the services we provide don't directly impact the public. Though, each day PBEM staff are dependent on this program to: pay vendors, be paid as employees, complete ordinances, draft contracts, understand changes in accounting, understand classification and pay changes, communicate with the public, and much more. Particularly in the finance, accounting, HR, procurement, and grants functions, the number of rules that must be complied with would be nearly impossible for a bureau manager focused on administering direct program services to successfully navigate without this program. With this program, the bureau benefits from having subject matter experts available to help staff with finance and administrative tasks they are not familiar with.
Over the next fiscal year, PBEM will work to better document Administration and Support costs to show which programs receive the most support.

Equity Impacts

Administration and Support encourages equitable outcomes through the selection of our vendors, the hiring of our employees, how we communicate, and ongoing bureau wide trainings. This program's biggest equity impact is how we impact our other bureau programs. When PBEM hires, we encourage expanded outreach, training evaluators on bias, the use of equity questions, and the use of scoring guidance for evaluators; so, every evaluator is scoring with similar criteria. When we communicate, we encourage simple language, dissemination in multiple languages, and providing written and audio options when feasible. The bureau's equity committee is included in this program offer.

Changes to Program

There have been several large changes in the Administrative and Support program. Since January 2017, PBEM has had an Interim Director after the departure of PBEM's longtime Director. There was also turnover in the Finance Supervisor and Accountant III positions. Therefore, of the five permanent employees in this program, there has been turnover in three. This has meant that staff needed to learn new positions but has also allowed new staff to bring a fresh perspective to PBEM's work. PBEM welcomed a new permanent Director in June. This is just in time to begin PBEM's next strategic planning effort in fiscal year 2019-2020. The new strategic plan will cover years FY 2020-2023.

In an effort to seek efficiencies and enhance coordination, PBEM has begun to share the Public Information Officer position 50/50 with the Bureau of Emergency Communications. This has created efficiencies because the PIO can represent both PBEM and BOEC at Citywide and regional meetings. The PIO can also build media relationships once that positively impact both bureaus. PBEM is currently looking to use these freed up resources to partner with another bureau to hire an equity manager.

An expense tracking change we've made since last fiscal year is to track grants received under the benefitting program, instead of within this program. Therefore, you'll notice a large drop in the budget in this program and related increases within the Emergency Operations and Regional Disaster Preparedness Organization programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	143,275	0	0	0
External Materials and Services	658,557	2,249,482	3,698,610	195,679
Internal Materials and Services	703,391	371,745	396,165	293,564
Personnel	547,974	676,110	1,241,554	701,727
Sum:	**2,053,197**	**3,297,337**	**5,336,329**	**1,190,970**
FTE	7	6.9		

Resources: This program is supported by General Fund Overhead and General Fund discretionary funding.

Expenses: The majority of this programs cost is personnel, making up more than 60% of the total program. Internal services provided by the City; such as cell phones, computer support, and printing charges, are housed in this program for much of the bureau. Personnel is the most critical cost to ensure ongoing program delivery.

Staffing:	5.3 FTEs currently support this program.
Assets and Liabilities:	N/A

Program Information

Bureau:	Portland Bureau of Emergency Management	**Program Contact:**	Somer Erickson
Website:	• www.portlandoregon.gov/pbem • www.publicalerts.org	**Contact Phone**	503-823-4187

Community Programs

Program Description & Goals

PBEM's Community Resilience program conducts community outreach and training to instruct Portlanders on disaster preparedness, response, and recovery. Program goals include:
• Recruit, train, and manage skilled volunteers ready to help themselves, their families, and their neighbors after a large disaster.
• Ensure equal access to disaster preparedness and response programs regardless of race, class, gender, age, or ability. Reduce existing inequalities and promote universal design (program design and instruction adapt to the capacity, perspectives, and resources of each community).
• Promote business continuity planning to Portland businesses.
The community programs have been very successful. Their targets and actuals have been steadily increasing, for example the number of active NET teams. PBEM will complete a strategic plan over the coming fiscal year. PBEM is also reorienting community programs to underserved communities. As these strategies become more defined, the strategic goals will be adjusted.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of new Neighborhood Emergency Team volunteers trained per year	511	501	900	500	350
Number of active NET Teams	70	80	80	80	86
Percentage of neighborhoods with active NET teams.	71%	82%	82%	85%	90%
% of NET volunteers that remain active in the program annually	N/A	96%	95%	95%	90%
NET Program Diversity	N/A	N/A	0	33%	30%
Outreach to historically underserved communities	N/A	N/A	0	45%	65%
BEECN Program Deployment Readiness Index	N/A	N/A	0	22%	80%

Explanation of Services

PBEM's Community Resilience team delivers services through:
• The Neighborhood Emergency Team program ("Portland NET"). PBEM trains volunteers on post-disaster response skills such as search and rescue, triage, medical treatment, radio communications, and team organization. PBEM also offers similar classes in Spanish (the "Listos" or "Ready" program). Outputs include fully trained volunteers, organized volunteer teams, and advanced training opportunities.
• The Basic Earthquake Emergency Communications program ("BEECN"). PBEM trains Portlanders on radios and provides a emergency supplies cache at 50 locations throughout the City. BEECN will enable neighborhoods to pass messages to and from the City Emergency Coordination Center (ECC) by radio. Outputs include deployed equipment caches, reliable radio communications, and organized volunteer teams to run the BEECN equipment.
• The Community Resilience Team also gives presentations and produces printed and web-based materials on how to prepare for emergencies and disasters. PBEM focuses on communities in Portland traditionally underserved by local government. This includes communities of color, persons with disabilities, teenagers/youth, elderly persons, and persons who have immigrated to Portland from other countries. Outputs include hours engaged by PBEM staff and volunteers educating community groups, and web-based and printed preparedness materials distribution.

Equity Impacts

PBEM designs programs, outreach, and policies for individuals with disabilities, communities of color, and people who do not speak English as their first language. These communities are most likely to be impacted in a disaster. Historically, they have also received less government funding and benefit the most from targeted investment. All PBEM community programs are accessible and promoted to persons with disabilities. PBEM makes reasonable accommodations when requested. PBEM collects and tracks data to measure underserved community engagement and promote equity. That data includes the PBEM volunteers' demographic data and demographic data for communities PBEM conducts outreach events in. PBEM also monitors and relies on the latest academic studies on the disproportionate impact disasters have on low income households, non-English speaking households, persons with disabilities, and communities of color.

Changes to Program

Community Resilience concepts have changed and grown significantly over the past year. Prior to FY 2018-19, PBEM primarily trained and developed disaster response volunteer teams (Portland NET and Portland BEECN). A staff vacancy allowed PBEM to transition its preparedness training to focus on underserved community.
The FY 2017-18 budget added two positions to the NET program. This allowed PBEM to increase output of volunteers and teams, and target training to underserved groups such as youth and the African American community. The staff assigned to these tasks have worked at PBEM for a year.
The FY 2018-19 budget added a position to focus part-time on outreach to Portland's business continuity. This position started in November.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	154,250
Personnel	0	0	0	542,647
Sum:	**0**	**0**	**0**	**696,897**
FTE	0	0		

Resources: This program is supported by General Fund Overhead and General Fund discretionary.

Expenses: This program funds primarily personnel, more than 80% of its total expenditures, and wouldn't be able to meet service levels without the hard work of those employees. Other expenses include personal protective equipment, credentials, and supplies for trained volunteers. Room rental, instructor, and incidental costs for trainings. Community outreach relies on event sponsorships, printed material, and giveaways. In prior years, the expenses of this program were captured in the Operations and Planning programs.

Staffing: 4.5 FTE's currently support this program.

Assets and Liabilities: N/A

Program Information

Bureau:	Portland Bureau of Emergency Management	**Program Contact:**	Jeremy Van Keuren
Website:	https://www.portlandoregon.gov/pbem/71745	**Contact Phone**	503-823-4421

Emergency Operations

Program Description & Goals

The Operations Section is responsible for the City's Emergency Coordination Center (ECC), ensuring that the facility, technology, and equipment is operational and ready for use anytime. The Operations section recruits, trains, and exercises City employees on their post-disaster roles through the ECC responder program. The Operations section coordinates the PBEM Duty Officer program which trains PBEM staff on how to monitor public safety incidents, communicate with elected and appointed staff, coordinate the City's emergency response actions, and fill resource requests. The Operations section also develops written guidelines for the City's emergency response.

All training attendance is tracked. PBEM's performance measure goal of "number of hours completed by students in PBEM classes annually" is 2,000 hours. Training and exercise is planned in multi-year cycles. Some years are more training heavy; in FY 2017-18, PBEM offered 13 classes and exceeded the goal by 400 hours.

All training evaluations are tracked. Last year, PBEM's training participants who rated PBEM classes as "good" or "excellent" was 95%. In FY 2019-20, PBEM will move from a training focus to exercises, and will also solicit evaluations on all exercises.

PBEM has an ECC Responder Recruitment and Training Plan. PBEM has set its own goal to recruit 167 ECC Responders and is about 70% to that goal. In 2018, 18 City staff became ECC Responders, higher than any recent year. On average, ECC Responders have completed two-thirds of their required training.

Consistent high evaluation ratings and class attendance indicate PBEM trainings are well-regarded. The uptick in ECC Responder recruitment indicates that increased exposure at City events and targeted recruitment efforts for specific positions has been successful.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of completed improvement plan tasks completed within agreed upon timeframe	94%	72%	20%	75%	75%
Percentage of participants who rate PBEM classes and exercises as "good" or "excellent"	85%	94%	80%	80%	95%
Number of participants in a Portland Bureau of Emergency Management class and exercise annually	N/A	N/A	0	300	300
Number of hours completed by participants in a Portland Bureau of Emergency Management class and exercise annually	N/A	N/A	0	2,000	2,000

Explanation of Services

The Operations section administers software needed during emergency response. One platform is WebEOC, a crisis information sharing software that allows regional staff to share information with each other. The City has been using WebEOC for over ten years. PBEM will initiate an RFP process that will be completed in FY 2019-20 for upgraded crisis information sharing software. The other, called Everbridge, allows PBEM to send emergency alerts to the public and City staff. This section oversees specialized ECC technology and communications such as digital radios and satellite phones.

This section creates written guidelines that describe how the City will respond to incidents. These guidelines are developed through a coordinated process with City staff, County, and regional partner agencies.

This section develops training courses from the content in PBEM's response plans and guidelines. These courses are delivered to PBEM and Citywide staff. This section also simulates disaster exercises where staff can practice hands-on tasks that they would need to accomplish in an emergency.

Finally, this section maintains the Improvement Plan database. The exercises described above reveal weaknesses in the City's plans, training, or equipment. The Improvement Plan database guides PBEM's work plans and process improvement.

This program is vitally important to the community because it ensures that Citywide staff have the equipment, training, and processes ready to respond to any emergency incident. The Operations section prepares to coordinate services such as HAZMAT evacuations, water and food distribution, firefighting, urban search and rescue, and law enforcement after major disasters.

Equity Impacts

Generally, middle class individuals with resources and social connections beyond their neighborhood do not access government-provided resources after minor disasters. These individuals are more likely to have purchased emergency supply kits, have their own vehicles, have the resources to stay in a hotel for a few nights and/or have someone they can stay with. For example, during the Cully HAZMAT evacuation in March 2018 Multnomah County, in partnership with PBEM, provided shelter for 140 people. The primary language of those sheltered was 25% English, 48% Spanish, 21% Somali, and 6% Maay Maay (a Somali dialect). In the neighborhood the fire was located, census data from 2010 listed the population as 49.4% White, 29.9% Hispanic and 10.1% Black.

In Hurricane Katrina, 71% of deaths were people over 60. Individuals with limited mobility, who don't speak English, or have a low income are all disproportionally affected by disasters. Cheap housing tends to have higher risk for natural hazards. For example, homes are relatively inexpensive near Johnson Creek in Lents which floods about every five years. Historical exclusionary policies also have a disproportionate impact on those affected by disasters. Redlining often forced African Americans into areas with high natural hazard risk. In Portland, this occurred with the Vanport flood.

The houseless community is impacted most frequently in Portland. Minor floods, severe cold or hot weather, and poor air quality impact the unsheltered community before it affects those in homes. The Operations section coordinates with City and County partners to plan for and provide outreach, sheltering and transportation for individuals experiencing homelessness.

Disaster research continues to show that individuals over 60, with disabilities, people of color, and low- income groups are most impacted by disasters. The national and local examples above reinforce this. Therefore, questions related to these groups are included in all PBEM exercises. The trainings present information to participants about disparate impacts and teach attendees skills to address underserved community's emergency response needs. For example, the "Winter is Coming" class is focused almost exclusively on services unhoused and disability communities need during a snowstorm.

Changes to Program

Escalated calls for service and weather-related incidents are unpredictable and vary greatly. In 2017, there were far more Duty Officer calls for service than in 2018. Generally, there is one larger scale incident response per year, requiring ECC activation for about 24-48 hours.
For the past year, this program has been constrained by staff vacancies. The Operations Manager was appointed as the Interim Director. The Exercise and Training Coordinator has been serving as the Interim Operations Manager, but the net effect is the same. There are three people doing four jobs. This has required the section to focus on software, equipment, and guideline maintenance. It has limited the section's ability to update internal City policies and guidelines.
A long term strategic plan item for the Operations section is to update the City's crisis information sharing software. Several exercises and incidents have shown that the City's current system is outdated and difficult for City staff to learn. PBEM recently completed a requirements analysis to determine the needed system features. Over the next year, PBEM will complete an RFP process. Approximate costs are hard to estimate before the RFP process is further along. Upgraded software should allow streamlined communication amongst City of Portland bureaus. It should also reduce the workload on the software administrator by .25 FTE, allowing the employee to focus on process improvement and development.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	67,478	0
External Materials and Services	212,121	289,806	677,035	596,749
Internal Materials and Services	87,446	492,498	552,518	604,790
Personnel	449,109	500,329	749,213	627,456
Sum:	**748,676**	**1,282,633**	**2,046,244**	**1,828,995**
FTE	6	6	5	5

Resources: This program is supported by General Fund Overhead, General Fund discretionary, and Federal Grant funding. Currently, over ten percent of the programs budget is projected to be covered by the Emergency Management Performance Grant (EMPG), though it has not yet been awarded, has been a stable funding source over the last five years.

Expenses: This program funds the majority of the Emergency Operations Center (ECC) facilities cost; including technology needed during an emergency activation.

Staffing: 5.0 FTE's currently support this program.

Assets and Liabilities: The ECC facility is an incredible asset to the City. Since it came into service in 2013, the bureau has been working with the City's Facilities Division to ensure appropriate asset management of the building. In the coming years, Facilities will hire a consultant to assess the building condition, determine appropriate maintenance strategies are in place, and that major maintenance funding is at an appropriate level.

Program Information

Bureau:	Portland Bureau of Emergency Management	**Program Contact:**	Katy Wolf
Website:	https://www.portlandoregon.gov/pbem/66452	**Contact Phone**	503-823-3874

Planning & Mitigation

Program Description & Goals

PBEM's Planning and Mitigation Program goal is to maintain a complete set of high-quality disaster mitigation, response, and recovery plans. Excellent plans:

- Engage all relevant stakeholders during development
- Are actionable and guide the City's emergency response and recovery actions
- Influence City policies and investments in disaster resilience
- Reflect best professional standards
- Put community needs first
- Address the disparate impacts of disasters on historically underserved communities.

FEMA and the non-profit Emergency Management Accreditation Program provide guidance on what constitutes a complete set of plans. The City's plan library currently includes a hazard mitigation plan, an operational continuity plan, a basic emergency operations plan, and specific plans addressing floods, earthquakes, alert and warning, communication, evacuation, damage assessment, and debris management. The City does not have plans for fuel and energy / utility restoration, private sector coordination, commodity distribution, volunteer and donation management, or disaster recovery; our plan library is about 2/3 complete. We support and rely on Multnomah County plans for some functions such as mass sheltering and fire.

All plans need to be reviewed and updated every 1 – 5 years to reflect changes in technology, staff, City structures, and the evolving emergency management trends.

PBEM has two performance measures for Planning; the number of plans that are up-to-date, and the number of bureaus with adequate COOP plans. The performance trend for bureaus with adequate COOP plans is positive and is expected to continue in that direction, because PBEM now has a permanent staff person who can dedicate 50% of their time to City COOP planning.

The trend for plans that are up-to-date has been declining steadily. As the number of plans increases, the amount of time needed to keep them up to date also increases. And increased awareness of hazards, especially earthquake, has also increased the demand for policies to mitigate risks; this policy work is lead by the same staff. The same staff person also manages PBEM's community outreach and volunteer programs, which have also grown tremendously in the past few years. The effect is that PBEM now has 22 staff but only 1.5 full-time planners. In contrast, Multnomah County Emergency Management has 11 staff and 4 full-time planners.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of PBEM plans that are up-to-date according to their published standards	79%	62%	70%	70%	90%
Percentage of bureaus with updated COOP plan that meet established standard	100%	81%	75%	75%	95%

Explanation of Services

There is an approximately 26% likelihood of a major earthquake in Portland in the next 50 years. The city has made great strides in the past decade towards strengthening infrastructure and preparing to respond to this event. However, we still have much work to do. Likewise, events in other states remind us that the risks of wildland fires that impact urban areas, flooding, and landslides are significant and increasing as our climate changes. And finally, the increase in Portland's unhoused population puts more and more people at risk, because unsheltered individuals are highly exposed during severe weather, bad air days, and urban flooding.
Portland can reduce the impact of disasters by developing plans to mitigate, respond to, and recover from them. PBEM's Planning and Mitigation Program leads the disaster planning process for the City. It convenes stakeholders from other bureaus and partner agencies such as Multnomah County, the Oregon Department of Transportation, and Multnomah County Drainage District. Together, we develop emergency response plans and identify strategies to reduce our risk over time - through targeted infrastructure investments, internal policies and practices to reduce risk, and plans to continue our essential services even following disruptive events. Each plan process takes 6 -18 months and results in a comprehensive written document that is reviewed and approved by the City's Disaster Policy Council. The plans are shared with response partners. The plan process itself also supports a culture of resilience and strengthens working relationships among participating bureaus and agencies. It creates a greater awareness of the interdependence of infrastructure and social service systems, and builds relationships amongst participants who will work together in a disaster.
Almost all US cities maintain a set of emergency plans. PBEM seeks to be a leader in acknowledging that historically underserved groups, particularly people of color, immigrants, houseless individuals, and people with disabilities, are consistently impacted first and worst in any disaster. Our plans explicitly acknowledge these impacts. PBEM planning program staff have received advanced training in addressing the inequitable impacts of disasters. Our planning program is also paired with our community outreach program, and staff meet together regularly to help ensure that plans incorporate community interests and knowledge.

Equity Impacts

Disasters disproportionately affect communities of color and people with disabilities. PBEM sought out an ADA audit of its plans two years ago, and has incorporated recommendations from that audit in each plan as it is updated. PBEM has increasingly incorporated demographic data into mitigation and response plans, and provided its planners with training on equity strategies. PBEM's Community Resilience Program has also made significant strides in engaging communities of color and immigrant communities, and has partnered with several community organizations to advance that work. The Community Resilience and Planning Programs have the same manager and the teams meet together regularly so that the planners can incorporate information from the community outreach program.
Under-investment in the Planning Program means the City will not have a complete library of up-to-date mitigation, response, and recovery plans. When that is the case, residents who have relatively abundant personal resources to rely on – insurance, savings accounts, food and disaster supplies, new or retrofitted homes, strong physical abilities – may still fare adequately in a disaster. Underserved communities will fall even farther behind.

Changes to Program

In the past few years, PBEM has increasingly been called upon to engage in citywide policy issues such as the problem of unreinforced masonry buildings, resilience considerations in capital asset management, and the vulnerabilities of the critical energy infrastructure hub. PBEM's planning staff have been tasked with this work. At the same time, PBEM has expanded its library of plans, which increases the amount of time needed to maintain those plans. As a result, PBEM's Planning and Mitigation Program is increasingly understaffed.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	387,409	186,594	534,703	95,240
Internal Materials and Services	2,360	10,238	148	1,101
Personnel	269,600	405,952	395,607	272,042
Sum:	**659,369**	**602,785**	**930,458**	**368,383**
FTE	3.75	3	2.5	2.5

Resources: This program is supported by General Fund Overhead and General Fund discretionary.

Expenses: This program funds primarily personnel, more than 90% of its total expenditures, and wouldn't be able to meet service levels without the hard work of those employees.

Staffing: 2.5 FTE's currently support this program. As of January 2019, a key planner position is vacant.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Bureau of Emergency Management

Program Contact: Jonna Papaefthimiou

Website:

Contact Phone 503-823-3809

Regional Disaster Preparedness Organization

Program Description & Goals

The Regional Disaster Preparedness Organization (RDPO) is a partnership of government agencies, private companies, and non-profit organizations in the Portland Metropolitan Region (PMR) working together to build the region's disaster resilience. The organization develops and maintains regional all-hazards disaster preparedness capabilities through coordinated planning, training and exercising, and investment in technology and specialized equipment. It operates in a geographic region that encompasses Clackamas, Columbia, Multnomah and Washington Counties in Oregon, and Clark County in Washington.

The RDPO work is conducted and coordinated through a well-defined structure of committees and work groups, including Policy, Steering and Program Committees, discipline-specific work groups, standing committees, and cross-discipline task forces. For the purposes of the Urban Areas Security Initiative (UASI) Grant Program, the entire RDPO structure is the Urban Area Work Group (UAWG).

The City of Portland is an RDPO contributing member, with many of its Bureaus, including PBEM, Fire, Water, and Environmental Services, along with a City Council representative, participating in the organization's strategic and program planning processes, project design and implementation, and federal and state advocacy through one or more of the RDPO committees, discipline work groups and multi-discipline task forces. The City also benefits from the RDPO's regional plan development, investments in specialized equipment and technology, and training and exercises that build important disaster response capacities among first responders, managers and executives, elected leaders, communities, etc. The RDPO serves as a critical platform for the City to engage in regional preparedness coordination efforts, which acknowledges regional interdependencies and the reality that disasters do not respect jurisdictional boundaries. Many PBEM staff participant in the RDPO and many of PBEM's programs benefit from RDPO's resources.

PBEM is the RDPO fiscal agent for its staffing and funding; the UASI grants and local member contributions. A memorandum of understanding (MOU) between RDPO and PBEM outlines roles and responsibilities of party. Given that the UASI grant is on a spending reimbursement basis, Portland is likely the only jurisdiction in the region that has the financial resource capacity to serve as the RDPO's fiscal agent, for which its governing body is grateful.

Over the next few years, the RDPO is working towards these seven strategic goals:

- Goal 1: Strengthen and sustain regional disaster preparedness coordination, collaboration, and governance.
- Goal 2: Enhance and maintain regional intelligence and information sharing, interdiction, disruption, and detection capabilities to help prevent and/or mitigate terrorism events, including cybersecurity, and other threats.
- Goal 3: Enhance the resilience of the region's critical infrastructure systems and facilities.
- Goal 4: Enhance the region's ability to identify and understand local risks, educate and better prepare the public to manage those risks, and foster long-term community well-being.
- Goal 5: Build and maintain regional response capabilities necessary to save lives, meet basic human needs, and protect property and the environment during an emergency or disaster.
- Goal 6: Build and maintain core capabilities necessary to assist affected communities, as well as the region as a whole, to recover effectively from major emergencies and disasters.
- Goal 7: Enhance and maintain regional capabilities to prepare and deliver coordinated, prompt, reliable and actionable information to the whole community before, during and after disasters.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Percentage of the Regional Disaster Preparedness Organization's strategic plan objectives achieved or in progress	N/A	N/A	0	95%	95%

Explanation of Services

The RDPO is a membership organization and reaches the public, including the Portland population through projects its partners implement with UASI and local contributed funds. Some Portland constituents have informally contributed feedback to RDPO staff that the existence of a regional collaborative disaster preparedness organization has made them feel reassured that the City is thinking and planning on a level beyond just the city for such things as catastrophic earthquakes. The robust participation of its partners' elected leaders and staff from across the region at all levels of the RDPO in regional strategic projects that build desired capabilities is a testament to the organization's importance and value.

The Portland metropolitan region has many inter-dependencies, such as public transportation, and natural disasters do not respect jurisdictional boundaries. Catastrophic events will exceed local jurisdiction's capacity to respond. Therefore, a regional collaborative organization like the RDPO makes strategic sense. It enables partners to share a common understanding and vision for disaster preparedness. It allows governments to develop and maintain capabilities that can be shared across the region. At a time when resources for this kind of work are becoming scarcer, the RDPO enables partners to more wisely and efficiently use available funding.

The RDPO Strategic Plan encompasses several priority areas, including advancing equity and planning for high/critical impact events, such as earthquakes.

Equity Impacts

RDPO has overarching strategic principles in its Strategic Plan that express a commitment to advance equity efforts in the region. These principles are: ensure equity and fairness in adopting regional policies and making investments; and use a whole community approach, considering and integrating all stakeholder groups perspectives. The RDPO has completed an assessment across the region to understand the pre and post disaster needs of people with disabilities and others with access and functional needs, and apply those recommendations in program development.

The RDPO Program Committee has committed to add an Equity Advisor position. This position will support and guide deliberations with an equity perspective. The program committee makes program development and investment decisions. The RDPO is developing an Equity subcommittee composed of emergency management professionals with expertise in equity and inclusion. Project proposals are evaluated with an initial equity lens and there is a plan to further develop the equity criteria for proposals in the next proposal development phase.

Changes to Program

the right thing to do and evidence that equity work improves outcomes for the whole community following a disaster; and 5) growing cyber threats and incidents nationwide, which DHS/FEMA now requires all UASI recipients to address in their regional programs.

The RDPO identified a critical need to develop and maintain critical resource management systems, tools, regional multi-agency teams, and plans to ensure effective post-disaster response. Therefore, the RDPO has created a position and is hiring a new PBEM-RDPO limited-term, UASI-grant funded 1.0 FTE position, the RDPO Logistics Program Coordinator. This position will take on a robust work plan of RDPO/UASI-funded disaster resource management, logistics, and supply-chain projects under the RDPO's Resource Management Sub-Committee.

In FY 2019-20 we will begin to track costs associated with the UASI grant under this program in order to recognize that the City does not determine how these funds are used and that the funds don't only benefit the City but the region. All spending under the UASI grant and this program have a regional benefit and are prioritized by RDPO.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	10,452	193,816	72,792	2,822,014
Internal Materials and Services	9,083	16,907	11,518	13,899
Personnel	148,838	162,230	178,523	801,243
Sum:	**168,373**	**372,952**	**262,833**	**3,637,156**
FTE	1	1	5.6	

Resources: This program is supported by regional partners, general fund discretionary, and federal grant revenue. Without the Urban Area Security Initiative (UASI) grant, this program would not be able to meet its current service levels.

Expenses: This program funds the UASI grants and related projects prioritized by the RDPO. This program may often come in under budget, as UASI is a multiyear grant, where sub-recipients may spend any time during the grant period. Therefore, the entire amount of the sub-awards are budgeted, though they may not be spent.

Staffing: Staffing: 5.7 FTE's currently support this program. As of January 2019, two positions are vacant. Due to the grant funding, 4.7 of the FTE's are limited term; meaning the positions aren't quite as secure as permanent employees. Therefore, this program can experience higher rates of turnover.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Bureau of Emergency Management

Program Contact: Denise Barrett

Website: RDPO website: https://rdpo.net/

Contact Phone 503-823-5386

CITY OF PORTLAND, OREGON
1851

Marketing and Communication

Program Description & Goals

The Marketing and Communication program strives to ensure clear and concise communication from all PP&R divisions to the public as well as facilitate community engagement processes that connect Portlanders to their parks and programs. Through the power of storytelling and personal relationships, this program encourages the community's deeper investment in all bureau offerings as constituents, customers, and donors.

PP&R has dozens of active capital projects in need of community input and engagement and the bureau has revenue generation and fundraising needs totaling over $20 million annually. The program creates inclusive park designs, projects, programs, and policies that advance PP&R's Five-Year Racial Equity Plan. The program exists to support all divisions in promoting parks and recreation opportunities, building relationships, facilitating decision making, and driving revenue through program fees and fundraising.

Bureau performance measures tracked that are relevant to this program include the percentage of Portland residents participating in a PP&R program and the percentage of residents visiting a park at least once in the past year. Performance metric data for FY 2018-19 will be available in fall/winter of 2019.

Other key data and outcomes include:

-Perception Metrics – Review of the Community Needs Survey from 2017 shows significant community knowledge and/or use of park and natural area opportunities and a gap in knowledge and/or use of recreation opportunities. Major perception metrics include nearly 94% of respondents visiting a park or natural area in the last 12 months (goal: 95%); nearly 60% not having participated in a recreation program in the last 12 months citing lack of awareness as the biggest barrier, and those earning below $50K/year having the lowest participation.

-Intervention Metrics – PP&R's central marketing team (does not include staff in divisions other than Operations & Strategies) attempts to intervene on these perception metrics by executing approximately 350 discrete graphic design projects annually with about 18% requiring translation into one or more languages. The website is the community's preferred information channel and this team drives web views (up nearly 7% in 2018;, increases social media engagement (up 16% in 2018, ~36 posts in languages other than English); and moves the message through earned media (~800 media hits annually, including about a dozen in languages other than English).

-Condition Metrics – Staff from this program leverage over $2 million in sponsorships, $2-5 million in partnerships, and $5-10 million in grants annually; drive new revenue targets from program fees (goals are currently under development in concert with the Cost Recovery Policy update); encourage voter stewardship of parks (74% of bond vote in 2014); and during the 2017-2019 timeframe engaged more than 6000 Portlanders in 48 public involvement processes.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Percentages of households participating in recreation activities	N/A	N/A	N/A	0	40%
Percentage of households visiting a park	94%	N/A	94%	94%	95%

Explanation of Services

Services fall into three general categories:

-Marketing & Communication: Strong stories and engaging photography and design are the foundation of successful communications. Communication and promotions plans are developed individually to match the needs of projects or programs. This program develops revenue-generating marketing and promotions plans and uses print (posters, fliers, regional guides and advertisements in local publications) and digital communications (web, e-newsletters, social media, television, and radio to execute them.

-Community Engagement: Community engagement processes that strengthen community outcomes are designed on an individual basis by project or program. Outreach strategies through phone, focus groups, digitally, and public meetings are all used to accomplish program goals.

-Partnerships and Development: Creating and stewarding partnerships strengthens community ties to PP&R's parks system and generates additional sponsorship, grant, or donation revenue for investment in projects or programs.

Cultural responsiveness is a critical component of clear communication, along with strong relationship development. Both are woven through the above work. As currently structured, this program's budget has overlap with the Community Engagement program and does not include the recreation marketing team. In the future, this program will be refined and realigned to more explicitly include all budgets aligned with this work.

Equity Impacts

This program coordinates efforts to implement goals identified in the bureau's Five-Year Racial Equity Plan.

Marketing & Communications: While strides have been made for all graphic projects to be designed with equity and cultural responsiveness in mind, PP&R works toward continuous improvement in this area. Staff strive to meet or exceed ADA guidelines for print and digital distribution, produce translations into one or more language for over 18% of graphics projects, and work closely with culturally-specific communities to create designs that are culturally-responsive—especially for programs where the majority of participants speak languages other than English or are immigrants or refugees.

Community Engagement: Every capital project is evaluated to assess whether the project disproportionately benefits or burdens communities of color, immigrants, refugees, individuals with disabilities, and those who are low-income. Resources and outreach efforts prioritize engaging communities that have not historically had access to decision-making.

Partnership and Development: Primary sponsorship efforts for the bureau include underwriting Summer Free for All—a program that provides culturally responsive concerts, movies, and a lunch and play program for youth, free of charge and accessible to all.

Changes to Program

Over the past five years, instead of adding support centrally for this function, the bureau has opted to build capacity within divisions themselves. For example, after Recreation Arbitration, there is now a team of marketing staff in the Recreation Services Division. Staffing for public involvement has grown as the CIP has expanded.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,835	14,045	91,883	59,736
Internal Materials and Services	9,112	7,278	3,074	4,294
Personnel	831,968	789,329	1,030,415	1,094,103
Sum:	**844,915**	**810,652**	**1,125,372**	**1,158,133**
FTE	9	8	8	8

Resources: While the resources of the program are mainly General Fund discretionary, it is important to note the relationship of these dollars to other funds. A significant portion of General Fund investment in this program generates revenue for other programs either through the marketing and communications aspects of stewardship of sponsorships or specific customer revenue generation for permits, classes, and more. Additionally, as some of this program is related to community engagement for capital projects, a portion of staff hours can be charged to specific capital projects.

Expenses: Of the $1.16 million budget, most of the program expenses are related to staff costs. Other costs are related to communications technology that support programs bureau-wide.

Staffing: The Marketing and Communication program includes a Development Manager, a Development & Partnership Coordinator, a Marketing Manager, a Graphic Designer, and a media and constituent relations staff person. Part-time or contract staff are also utilized to accommodate increases in workload; however, this requires available funding so that staff time can be charged to specific projects. In addition, community engagement staff who are supervised by the Equity & Inclusion Manager (since January 2018) are currently included in this program's budget. Most of their work is focused on advancing capital projects through meaningful community engagement.

Assets and Liabilities: There are no capital assets valued at above $10,000 associated with this program. Smaller value assets are replaced when broken or out of date and when EMS is available or, if capital project related, can be charged to a capital project.

Program Information

Bureau: Portland Parks & Recreation
Website: portlandparks.org
Program Contact: Jennifer Yocom
Contact Phone 503-823-5592

Community Engagement

Program Description & Goals

Portland Parks & Recreation's (PP&R) Community Engagement program promotes social equity, supports public safety, and creates community connections through partnerships, volunteer opportunities, outreach, and public participation. The program seeks to reduce the impacts of economic and social disparities on individuals and within the community by providing places and services that promote health, safety, and learning opportunities for Portlanders. The program maintains a strategic focus on reaching and supporting historically underserved communities.

Program objectives are to:

-reflect and serve Portland’s diverse and changing communities;

-build relationships, strengthen partnerships, and facilitate collaboration to integrate underserved populations (teens, people with disabilities, seniors, refugees, and immigrants); and

-promote connections to and support for the parks system.

Bureau performance measures tracked relevant to the Community Engagement program include overall estimated attendance in recreation programs and attendance specific to the Teen Program. Performance metric data for FY 2018-19 will be available in fall/winter of 2019.

Total estimated attendance increased nearly 2% during the same time period.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Annual scans for TeenForce passes	43,736	47,684	49,000	49,000	51,500
Total estimated attendance	2,084,404	2,123,192	2,180,000	2,180,000	2,300,000

Explanation of Services

The Community Engagement program provides equitable access to recreation, learning, and wellness opportunities, and offers a range of services to support and engage people of color, immigrants and refugees, people living with disabilities, seniors, teens, and communities that have traditionally not been engaged in decision making. The community engagement team ensures that those most impacted by a bureau decision about assets, planning, or programming participate in the decision-making process. Specific focus is given to historically underserved communities and culturally-responsive processes.

Program service highlights include:

-The Senior Recreation program partners with community organizations, including IRCO and Meals on Wheels, to serve seniors, communities of color, and people with disabilities.

-The Teen Program offers free, safe spaces for youth (ages 10-20 years old) to engage in prosocial behavior, surrounded by caring adults. This Program seeks to reach youth at risk of exposure to violence, gang violence, and trauma and focuses on reaching under-served and under-represented communities of color on the east side of the Willamette River. The Teen Community Collaborative Initiative strengthens partnerships with culturally- specific organizations that serve low-income youth, particularly refugee and immigrant youth, and youth of color through in-kind facility use or grant funding.

-The Adaptive & Inclusive Recreation (AIR) program provides recreational, educational, and wellness programs for people with disabilities. These programs are in addition to PP&R's Inclusion Services that support people with disabilities to participate in recreation programs.

-Volunteer Services offers individuals, schools groups, businesses, and community organizations volunteer opportunities in recreation, stewardship efforts, and park projects, culminating in over 450,000 volunteer hours each year.

-The Property Management program develops partnerships that align with PP&R's mission, vision, and Strategic Plan. Investments include the following strategic partnerships: Schools Uniting Neighborhoods (SUN), The Rosewood Initiative, Pioneer Courthouse Square, Linnton Community Center, and Leach Botanical Garden.

Equity Impacts

The Community Engagement program seeks to offer services that reduce disparities, strengthen communities, and support people of color, immigrants and refugees, people living with disabilities, seniors, and teens.

The Equity and Inclusion department leads and coordinates with PP&R divisions to implement goals identified in the bureau's Five-Year Racial Equity Plan. Below is a summary of the key objectives and activities addressed through the Community Engagement program:

-Strengthen outreach and public engagement to communities of color and immigrant and refugee communities.

-Provide equitable access and investment to developed parks, natural areas, programs, and services for all Portlanders and reduce disparities in people of color's access to healthy environments and recreation, learning, and wellness opportunities.

-Partner with and build the capacity of community organizations accountable to communities of color and refugee and immigrant communities to increase access to programs and services.

-Build parks and provide programs and services that are more relevant and welcoming to people of color, immigrants and refugees, people living with disabilities, seniors, teens, and other disenfranchised communities.

Changes to Program

In the FY 2019-20 Adopted Budget, the Community Engagement Program was reduced by $786,000. These budget reductions were taken in the following areas:

- PP&R realigned its Teen Service Program and Montavilla Community Center. Staffing was reduced, and program hours were aligned with peak attendance times, Monday through Friday. Elimination of dedicated Teen Services staffing on the weekend may affect the TeenForce Youth Pass access. In addition, funding for Gang Outreach services was returned to FY 2017-18 funding levels, reduced for grants to other youth-serving organizations, and the Park Squad summer interns program was eliminated. In addition, Montavilla Community Center staff will be reduced/ restructured, and programs will be reduced to focus on educational pre-school and teen programming. The staff restructure will provide a greater emphasis and priority on youth programming and less on community programs at Montavilla Community Center. In the Teen Services Program, 60% of youth served come from underserved and communities of color. Reductions to the Teen Program will reduce service levels, however the impact will be mitigated through careful scheduling and programs at all sites.

- In addition, PP&R is reducing funding for Partner pass throughs by 5%. This funding reduction impacts Leach Botanical Garden, Linnton Community Center, Pioneer Courthouse Square, SUN Schools, and The Rosewood Initiative. It is difficult to assess service impacts associated with these reductions as pass-through recipients will have differential capacity to absorb, mitigate, or backfill reductions.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,532,039	2,453,000	2,389,522	2,035,305
Internal Materials and Services	103,407	138,578	171,467	121,819
Personnel	2,161,078	3,044,050	2,314,122	2,749,061
Ending Fund Balance	0	0	34,115	34,541
Sum:	**3,796,524**	**5,635,629**	**4,909,226**	**4,940,726**
FTE	28.68	27.9	25.5	22.5

Resources: The current budget for all the programs within the Community Engagement program is $4.9 million. The program is supported predominately with General Fund support, with about 10% of total support originating from program fees.

Expenses: The current revised budget is insufficient to support costs related to seasonal employees and related benefits. This is reflected in the personnel category, which has been increased significantly for FY 2019-20 to accurately reflect these costs.

Staffing: Total staffing includes 22.5 FTE (a net reduction of 3 FTE) including staff to support teen-focused services, programs for seniors, volunteer coordination, and equity and inclusion. Approximately 20% of the program's personnel budget consists of seasonal employees and benefits.

Assets and Liabilities: The bureau's Teen Program predominately operates out of community center sites, many of which are experiencing a significant deferred maintenance backlog.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Margaret Evans

Contact Phone 503-312-1522

Leadership and Advocacy

Program Description & Goals

Portland Parks & Recreation's (PP&R) Leadership and Advocacy Program includes work originating from the Director's office.

The goal of the program is to provide leadership and support in line with the bureau's mission and to further the objectives of the bureau's long range vision plan (Parks 2020 Vision) and the bureau's three year Strategic Plan.

This program is responsible for all performance metrics associated with the bureau's Strategic Plan. These metrics are identified within specific program offers.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Leadership and Advocacy Program includes the bureau Director, Deputy Director, and the support staff they need to engage with the Mayor's Office, City Council, the Parks Board, employees, and other key friends and partners groups to advance the mission and objectives in the bureau's long range vision and Strategic Plan. Activities may include employee meetings, City Council or Mayor work sessions, meeting with the public and partner organizations, and participation in national or local organizations to further the mission of park and recreation agencies. In addition, the program oversees the bureau's division managers, coordinates direction for the bureau's Senior Management Team, and coordinates policy with the Commissioner in Charge.

Equity Impacts

The program leads the organization through the bureau's Five-Year Racial Equity Plan and Strategic Plan, both of which include significant measures to further the bureau's progress towards serving all Portlanders and removing barriers, including race, ability, geography, and income.

Changes to Program

PP&R's leadership has seen significant transition within the last 12 months. Interim Director Kia Selley started in May 2018. In the fall of 2018, the bureau transitioned from Commissioner Amanda Fritz to Commissioner Nick Fish. Director Adena Long was hired and began working at PP&R in February 2019. In addition, the Deputy Director position has been vacant since December 2018; the position will be filled in summer of 2019.

In the FY 2019-20 Adopted Budget, PP&R has received one-time transition funding of $365,000 for project management and community engagement for various sites transitioning to new operating models. PP&R has also received $100,000 in one-time funding resources that will be transferred to the Portland Parks Foundation.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	126,886	205,338	214,907	606,557
Internal Materials and Services	19,294	18,344	19,076	11,798
Personnel	666,914	846,974	1,114,252	810,381
Sum:	**813,094**	**1,070,656**	**1,348,235**	**1,428,736**
FTE	4	10	4	4

Resources: The Leadership and Advocacy program is supported entirely with General Fund resources and receives no outside program revenue.

Expenses: In the current year, revised budget costs paid to the Office of Management and Finance are included. These costs have been removed and transferred to the bureau's Capital Fund budget for FY 2019-20. In addition, the revised budget numbers reflect the cost of the bureau's Equity and Inclusion Manager. These costs have been transferred to the Community Engagement program for FY 2019-20.

Staffing: Staffing includes the bureau's Director, Deputy Director and two support staff.

Assets and Liabilities: There are no assets and liabilities associated with this program offer.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Adena Long

Contact Phone 503-823-5379

Visitor Services

Program Description & Goals

Portland residents and visitors are more likely to interact with a Portland Parks & Recreation (PP&R) employee than any other city employee or official. PP&R employees are ambassadors for the City, building trust through daily connections with the public. This core function of the bureau is at the forefront of its Visitor Services program—a combination of three PP&R services. Visitor Services — Customer Service Center (CSC), Inclusion Services, and Park Rangers — are often the first point of contact for the public, providing education and information, assistance, and equitable access to a broad range of city services.

Population growth in the Portland Metro area has outpaced the national average for the last decade —a trend that is expected to continue for the next five decades. As Portland grows, residents and visitors will increasingly rely on the services provided by the Visitor Services program. A 2017 community survey reported an estimated 94% of Portlanders visited a park and 40% participated in a recreation program in the prior 12 months.

The CSC provides friendly and welcoming assistance and information about PP&R and other city programs and services. Park Rangers are a visible presence in our parks and natural areas, promoting safety in our public spaces, and encouraging a wide range of positive experiences for the public. Inclusion Services provides accommodations and ensure that every person, regardless of ability, can positively participate in PP&R programs and services. The different components that make up the Visitors Service program have internal metrics used by staff to understand the needs and trends of services provided. Bureau performance measures that are relevant to this program include the percentage of residents who feel safe walking in a park during the day.

Historical data for the metrics below was provided by the City Auditor's Annual Resident Survey, which was discontinued in 2016. New surveys are in development that will provide future data to evaluate performance within this program offer.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of residents who feel safe walking alone in their neighborhood park during the day	N/A	N/A	N/A	0	83%

Explanation of Services

The CSC provides direct service to our customers via phone, in person, and through email. It also manages permit use of PP&R's outdoor facilities (public events, sports, picnics & weddings, commercial use, docking, etc.).

Inclusion Services ensures access to programs by providing auxiliary aids (headphones, communication devices) and services (translation/interpretation) to registered participants having a disability. It also ensures access to registered participants having a disability through modifications and accommodations of program locations and facilities.

The Park Rangers patrol parks and natural areas to educate and assist park patrons and prevent, identify, and abate nuisance behavior. They also respond to calls for service from the public and PP&R staff to respond to specific issues of concern in parks and natural areas.

Equity Impacts

Visitor Services is about providing quality, accessible, and equitable services to visitors and program participants. Multilingual Customer Service Center staff provide an invaluable service to residents who prefer communicating in a language other than English. The entirety of Inclusion Services is working for and with community members who identify as having a disability and seek assistance to access the amenities and services PP&R provides. Inclusion Services are free, and access is open to all community members. The Park Ranger program has been expanded to east Portland in recent years to help address previous disparities in the ambassador and security services provided in PP&R parks and facilities.

Equity is not only emphasized through the services provided but also by recruiting and retaining staff that represent the communities PP&R serves. In addition, all staff receive equity training, and rangers obtain training in cultural competence. Visitor Services staff is dedicated to engaging in positive interactions with visitors/participants and providing access to amenities and services.

Changes to Program

In the FY 2019-29 Adopted Budget, PP&R is eliminating a Customer Service Representative position, reducing the front-line team from 11 to 10. The CSC will continue to cover Ranger and primary service calls, and process permits. There may be an increase in primary call wait times and abandoned calls. In addition, a staff reduction may mean less ability to serve customers who are not native English language speakers as there is less opportunity to hire for that skillset.

Another significant change to CSC in FY 2019-20 is the return of staff to the Portland Building – currently projected to occur in December 2019 – and the related changes to service delivery with the Citywide rollout of a 311-service desk. The impacts of this change have not yet been determined; the City's Office of Management & Finance (OMF) continues to work through the details of this transition.

While funding and staff for Park Rangers has increased significantly over the past ten years, so has the volume of their work. Security services previously contracted externally are now fully internal and services have expanded in geographic scope. Demand for Ranger services has increased, both from PP&R staff and the public. These changes relate to the growing population in the Portland metropolitan area as well as societal trends such as homelessness. As a result, the total budget for the Park Ranger program has increased from $0.6 million (FY 2010-11) to $3.2 million (FY 2018-19).

In the FY 2019-20 Budget, PP&R is eliminating a Ranger Supervisor position, a Ranger position, and $100,000 of funding for seasonal Rangers. PP&R will fund 24 Park Rangers and 2 Ranger Supervisors to service 12,000 acres of property. Due to demand, reduced staff capacity may impact the bureau's ability to meet increased service demand during the peak summer season.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	849,408	623,026	3,441,827	4,116,029
Internal Materials and Services	1,940,823	2,249,063	1,895,041	2,325,886
Personnel	3,376,054	4,116,057	4,663,500	5,045,425
Fund Expense				
Fund Transfers - Expense	181,600	181,600	181,600	181,600
Sum:	**6,347,885**	**7,169,746**	**10,181,968**	**11,668,940**

	FTE	43.75	55.9	50.9	47.9

Resources: Visitor Service programs are funded primarily by the General Fund. The Customer Service Center supplements General Fund support with permit revenue originating from rental of park amenities (picnic areas, wedding sites, special events in parks etc.). The FY 2019-20 budget assumes a 25% reduction in permit revenue. This results from prices that are starting to exceed market rate and a reduction in demand, in part due to increased camping and the impact of homelessness in parks. The Park Ranger program receives support from parking revenues at Washington Park, as well as support for patrolling lands owned by the Bureau of Environmental Services.

Expenses: The primary costs for all three programs are staffing costs ($5 million). Additional budget authority is related to the bureau's agreement to transfer parking revenue at Washington Park to support maintenance projects within the park.

Staffing: In FY 2019-20, the Customer Service Center will have 16 full-time positions, including two supervisors, a program coordinator, business systems analyst, four recreation coordinators, and nine recreation leaders. Inclusion Services includes 2.5 recreation coordinators. Park Rangers employs 24 full-time rangers (a reduction of 1), two ranger supervisors (a reduction of 1), and a security and emergency manager. All three programs hire seasonal support staff to supplement full-time staff during the summer season and/or special events. The Ranger Program has reduced funding for seasonal support staff by $100,000.

Assets and Liabilities: Neither CSC nor Inclusive Services maintains fixed or mobile assets.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Shawn Rogers

Contact Phone 503 865 2388

Capital Development

Program Description & Goals

The Capital Projects and Professional Services Program is instrumental in creating and sustaining a healthy, equitable park system that makes Portland a great place to live. It is comprised of the Capital Improvement Program, the Bond Program, and the Engineering & Construction Management Program. The groups provide planning, design, project management and construction management of all projects greater than $10,000. Its two primary objectives include sustaining and modernizing existing asset functionality and growing the parks system to remove the inequities of parks service areas and provide equal parks and recreation opportunities to all residents.

The Program works with internal and external stakeholders, scopes projects, procures design and construction services, and manages design, construction, and commissioning.

The Program's major responsibilities include:
• Expanding existing assets and constructing new, maintainable parks and facilities with public input and support to accommodate population growth and equitable service;
• Protecting and maintaining existing community assets through maintenance, rehabilitation and renewal; • Completing capital emergency repairs prioritized using the equity lens;
• Removing Americans with Disabilities Act (ADA) identified barriers and implementing the ADA Transition Plan;
• Attaining and advancing the City's minority and women-owned contracting goals through project delivery; and
• Providing technical support to other bureau staff.

Specific performance metrics for this program offer have not yet been identified. Program metrics for all bureau programs are under review.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Capital Improvement Program:
• Planning, design, permitting, and construction of aesthetically pleasing, durable, and sustainable initiatives and capital projects within scope, schedule, and budget that addresses the needs of the community;
• Communication to the public and project stakeholders;
• Implementation of strategic PP&R and City-wide initiatives and policies;
• Collaboration with other City bureaus and outside agencies to further PP&R projects and goals;
• Administration of local, state and federal grants to supplement park design and construction efforts;
• Coordination and review of proposed outside agency or private development improvements on or adjacent to park property;
• Assistance with small design and construction projects for Central Services or Park Zone District staff; and
• Representation of the Parks Bureau on technical committees;

Bond Program: The $68 million Parks Replacement Bond provides urgent repairs in PP&R parks, community centers, and facilities throughout the city. The Bond projects target PP&R's most critical needs by focusing on fixing or improving:
• Playgrounds currently closed, at risk of closure, or deficient;
• Trails and bridges in need of replacement or repair;
• Pool mechanical systems and decks;
• Park maintenance buildings to address worker safety and efficiency;
• Pioneer Courthouse Square's waterproofing and infrastructure;
• Americans with Disabilities Act (ADA) barriers to improve park access for all Portlanders; and
• Restrooms and other facilities, including community centers.

Engineering & Construction Management Program:
• Managing the design, permitting, bidding, and construction of major maintenance and emergency capital improvement projects;
• Providing construction management services for larger Capital Improvement and Bond projects;
• Providing engineering and project support to PP&R Central Services and Land Stewardship Division;
• Participating in Non-Park Use Permit review, management, and construction oversight; and
• Contributing to developing fair and equitable approaches to construction contracting and management to help distribute public construction dollars to the diverse construction community.

Equity Impacts

The Program benefits all Portlanders including diverse communities of color, low income communities, youth, and persons with disabilities. This work is accomplished by making parks accessible to all, addressing ADA deficiencies, attaining contracting goals, repairing and preserving infrastructure prioritized with an equity lens, and designing and building with a more diverse future Portland in-mind. More equitable outcomes could be achieved by increasing funding for and speeding the development and operations and maintenance funding of newly planned parks and facilities in underserved areas, including East Portland. Additionally, evaluating the legal constraints on System Development Charge allocation and use could lead to more optimal investment opportunities for equitable outcomes.

Changes to Program

There are over 16,176 ADA barriers identified in our parks and most do not have identified funding or staffing available to fix them. City Council has committed to $1 million in on-going funding starting in FY 2019-20 to address these barriers.

The FY 2019-20 Adopted Budget includes $900,000 in one-time funding, allocated from the capital set-aside account, to fund improvements to failing culverts and other critical infrastructure in Forest Park.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	22,702,359	12,386,872	65,779,787	66,054,106
External Materials and Services	8,814,289	17,780,905	46,777,011	37,442,366
Internal Materials and Services	584,063	537,523	1,933,206	2,357,651
Personnel	1,720,535	1,986,768	5,906,931	2,473,351
Fund Expense				
Contingency	0	0	-26,891,296	1,008,350
Debt Service	73,924	429,215	0	283,750
Fund Transfers - Expense	359,738	21,194	0	0
Sum:	**34,254,908**	**33,142,476**	**93,505,639**	**109,619,574**
FTE	9	9	7	7

Resources: This program funded primarily by Systems Development Charges, the 2014 Parks Replacement Bond and a small contribution from the City's General Fund.

Expenses: Expenses are almost entirely related to capital construction projects.

Staffing: The Portland Parks and Recreation Capital Fund currently supports 30.25 FTEs. This is not currently reflected in the Capital Development program offer.

Assets and Liabilities: There are no assets and liabilities associated with this program offer.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Lauren McGuire

Contact Phone 971-940-5538

Facility and Amenity Maintenance

Program Description & Goals

Portland Parks & Recreation's (PP&R) Facility and Amenity Maintenance program is charged with maintenance and repairs of PP&R's nationally renowned parks system. The program goal is to provide timely, efficient, and appropriate professional/trades repairs to the bureau's assets, including mechanical, electrical, plumbing, carpentry, welding, painting, and other services.

Bureau performance measures include:

-percentage of residents rating the quality of park facilities as "Good" or "Very Good";
-percentage of work orders that are preventative;
-percentage of built park assets in fair or better condition; and
-capital major maintenance funding as a percentage of assets total replacement value.

Historical data for some of the metrics below was provided by the City Auditor's Annual Resident Survey, which was discontinued in 2016. New surveys are in development that will provide future data to evaluate performance within this program offer.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of residents rating the quality of park facilities as good or very good	N/A	N/A	N/A	0	66%
Capital major maintenance funding as percentage of assets total replacement value	1%	1%	1%	1%	3%
Percentage of work orders that are preventative	45%	47%	47%	47%	47%
Percentage of built assets rated in fair or better condition	N/A	50%	53%	53%	50%

Explanation of Services

The program responds to an average of 7,500 work orders per year. The program provides both preventive and emergency/on demand maintenance for PP&R built assets, including community centers, decorative fountains, restrooms, play structures, and other park features.

Equity Impacts

Equity is addressed both from the customer service and employment points of view. The Facility Maintenance and Repair program helps PP&R reach its equity and inclusion goals by ensuring that facilities are accessible, safe, and well-maintained for all Portlanders. The program uses an equity lens in project priority setting, aimed at exceeding the City's contracting goals for the utilization of Disadvantaged, Minority-Owned, Women-Owned, Emerging Small Businesses, Service Disabled Veterans Business Enterprises (D/M/W/ESB/SDVBE) contractors and sub-contractors, and provides services to remove barriers falling under Americans with Disabilities Act (ADA).

With a significant amount of vacancies and pending retirements from PP&R skilled trades positions, the bureau is reevaluating its staffing model including the creation of apprentice programs. The changing job market requires the bureau to enhance outreach strategies and community partnerships to ensure candidate pools are reflective of the diversity of the community.

Shop supervisors are applying an equity lens to scheduling. The program leadership is working on strategies to focus work time allocations more equitably, using equity data to inform decision making, and allocating maintenance work resources to the underserved areas of the city.

Changes to Program

Over the last few years, as PP&R assets continue to age and fail more frequently, the percentage of emergency and demand work orders has gone up. To address this issue, the program is working to shift its focus to more preventative work by collaborating with bond, capital, and operational teams. However, there is still a significant work order backlog, which results in a negative perception of the quality of program services to internal and external customers.

In the FY 2019-20 Adopted Budget, the Facility and Amenity Maintenance program has received $152,720 in ongoing funding to support operations and maintenance at new park developments.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	1,270,816
Internal Materials and Services	0	0	0	420,775
Personnel	0	0	0	5,657,945
Sum:	**0**	**0**	**0**	**7,349,536**
FTE	0	0	0	

Resources: The Facility and Amenity Maintenance program is funded almost entirely by General Fund resources. In the FY 2019-20 Adopted Budget, to improve budget planning and monitoring, PP&R separated maintenance functions into three Program Offers: Facility & Amenity Maintenance, Natural Area Maintenance, and Park Maintenance. This change explains the lack of historical data in the Facility and Amenity Maintenance Program budget.

Expenses: The primary cost of the program is personnel at $5.7 million for FY 2019-20. External materials and services, such as plumbing, electrical, construction, and other supplies, is approximately $1.3 million.

Staffing: Staffing levels for FY 2019-20 include 49 FTE, mostly in the maintenance trades.

Assets and Liabilities:	PP&R identified $15.9 million worth of assets that are overdue for replacements, including boilers, HVACs, heating units, and other critical components. There are no replacement funds available for most of these assets, and their failures are primarily managed as emergencies. Furthermore, approximately 50 assets are closed permanently (docks, tennis courts, playgrounds) because they failed, and no funds are available to fix them.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Lauren McGuire
Website:	portlandparks.org	**Contact Phone**	971-940-5538

Natural Area Maintenance

Program Description & Goals

Portland Parks & Recreation's (PP&R) Natural Area Maintenance provides natural resources and passive recreation services across 73 natural areas and 8,000 acres of forests, wetlands, meadows, and other natural landscapes. The program plans and implements vegetation management treatments to improve the ecological health of natural areas, support native wildlife, and keep natural areas healthy for future generations. The program manages more than 200 miles of soft surface trails that provide healthy recreational opportunities and enhance the livability of the city for Portlanders. It includes the Protect the Best Program, an innovative vegetation management program that treats healthy “core habitat” and Renew Forest Park, a holistic approach to repairing the largest forested city park in the country. The program manages Powell Butte, Oaks Bottom, and Forest Park, some of the city’s most treasured assets as well as hundreds of bridges, culverts, boardwalks, signs, trailheads, restrooms, and other built assets that keep Portland’s natural areas accessible to visitors and provide unique opportunities for people to experience nature locally.

Bureau performance measures tracked relevant to this program include:
-Total acres of park land treated for invasive weeds.
-Percentage of natural areas in good or very good condition.

The number of acres of invasive weeds treated is the sum of work by many programs. The decline in invasive weed treatment from FY 2016-17 to FY 2017-18 was due to a decrease in revegetation work by one of those programs. Performance metric data for FY 2018-19 will be available in fall/ winter of 2019. Though that program will continue to decrease its revegetation work, an increase is expected to occur in Forest Park in the coming years.

The percentage of nature areas in good or very good condition is measured every five years with the last measurement occurring in 2017. The next measurement is planned for 2022.

Other program performance measures used internally to track progress include: number of native trees and shrubs planted and invasive trees removed, miles of trail maintained or repaired, number of hours engaging volunteers in stewardship activities, and number of youth from diverse applicant pools employed in environmental jobs.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of acres of invasive weeds treated annually	1,914	1,551	1,900	1,900	2,450
Percentage of nature areas in good or very good condition	53%	N/A	N/A	0	53%

Explanation of Services

This program manages natural areas across the city. As the city becomes more densely populated, urban natural areas play an even more critical role in providing livability and access to nature. Additionally, preservation of natural areas is one important element for providing locally clean air and water and, on a larger scale, combating the effects of climate change. Often, the more natural areas are used by visitors, the more maintenance they require to keep weeds out, native vegetation and streams healthy, trails accessible, and infrastructure safe.

Services of the Natural Area Maintenance program include: -assessing ecosystem functions and threats;
-Initiating vegetation treatments to improve natural area conditions;
-Removing invasive plants;
-Planting native trees, shrubs and grasses;
-Conducting wildlife surveys and vegetation monitoring;
-Assessing trails and plan improvements;
-Completing trail maintenance and improvements, including leaf removal, tread repair and building rock walls, timber steps, and turnpikes;
-Performing storm response, including removing trees from trails and addressing landslides and erosion issues;
-Cleaning sites of vacated homeless camps;
-Removing graffiti and abating vandalism;
-Completing daily care and cleaning of natural areas and their associated built assets;
-Providing stewardship opportunities to students, youth, adults, groups and families, connecting volunteers to natural area restoration; and
-Working with community partners, researchers, and colleagues to continually develop best management practices.

Each year, the program treats hundreds of acres of vegetation, plants thousands of trees and shrubs, and addresses safety and user challenges along dozens of miles of trails; it engages partner groups and volunteers in hands-on reforestation and invasive species management projects. The program strives to keep natural areas healthy for the wildlife and visitors who use them and to build an ethic of stewardship for natural spaces.

Equity Impacts

The US Census Bureau estimates that by 2042, 50% of the US population will be people of color, yet trends in the environmental work force show that they are underrepresented. This program also engages communities of color in environmental stewardship and education.

PP&R's Natural Area Maintenance program specifically allocates stewardship and Youth Conservation Crew resources to communities of color and historically underrepresented communities. The Youth Conservation Crew program directly contributes to a more diverse hiring pool for seasonal employees for the entire bureau and helps meet the following Five-Year Racial Equity Plan goals:

-Increase the pipeline of youth of color in apprenticeship programs by 20% by 2020.
-Increase the percentage of employees of color hired seasonally and promoted.
-Streamline the hiring process and increase hiring and retention of full-time and seasonal employees of color.
-Provide career development guidance for employees of color to advance within the bureau.
-Scale existing programs and create a formal youth internship program for youth of color, and refugees and immigrant youth to have employment experiences.

Changes to Program

In the FY 2019-20 Adopted Budget, Natural Area Maintenance has received $16,085 in ongoing funding to support operations and maintenance at new park developments.

PP&R has also entered into a new interagency agreement that will fund natural area maintenance with Interagency (IAA) Revenue from the Bureau of Environmental Services (BES). The IAA will redirect the work of City Nature East staff to ensure benefits related to storm water management, flood control, and water quality on properties where BES has made a capital investment in acquisition, restoration, or both. Activities will include planning and implementation of natural area maintenance, including action plans, planting, weeding, mulching, monitoring, and other stewardship activities.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	3,402
External Materials and Services	0	0	0	500,644
Internal Materials and Services	0	0	0	430,645
Personnel	0	0	0	2,447,698
Sum:	**0**	**0**	**0**	**3,382,389**
FTE	0	0	0	20.2

Resources: The Natural Area Maintenance program is funded almost entirely with General Fund, with a small amount of budget coming from grants and interagency partnerships. In the FY 2019-20 Adopted Budget, to improve budget planning and monitoring, PP&R separated maintenance functions into three Program Offers: Facility & Amenity Maintenance, Natural Area Maintenance, and Park Maintenance. This change explains the lack of historical data in the Natural Area Program budget.

Expenses: Program expenses are primarily personnel to do the work in natural areas and some funding for materials and services for trucks, plant materials, and other supplies. These expenses are critical to maintaining natural areas.

Staffing: Over the years, several positions have been eliminated due to budget cuts. Budgeted positions are only added through natural area acquisition and new operations and maintenance funding or budget add packages. The program consists of 20 full-time field staff and approximately 2.0 FTE managers/administrators currently support this team.

Assets and Liabilities: The program manages 72 natural areas, including parking lots, signs, more than 200 miles of trails, scores of bridges and culverts, and other physical assets. The program also manages Forest Park and Powell Butte.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Tonya Booker

Contact Phone 503-823-5463

Park Maintenance

Program Description & Goals

The goal of Park Maintenance is to provide clean, safe, functional, and beautiful parks throughout the city and throughout the year. This program maintains daily operations at 146 parks and approximately 3,500 acres across Portland.

Most parks contain many assets—benches, pathways, restrooms, playgrounds, athletic fields, and other active and passive recreational amenities. Most of these assets are cleaned and inspected daily to provide a clean, safe, and positive public experience. In addition to built recreational assets, people come to parks to experience beauty in nature. Most parks contain grass, ornamental plants, and trees that provide nature in the urban landscape. This broad goal of providing clean, safe, functional, and beautiful parks throughout the city and throughout the year is measured by public user surveys. Portlanders have rated this service highly and the data suggests that performance is consistent, despite population increases (more park users) over the last 12 years. Bureau performance measures tracked relevant to Park Maintenance include the percentage of residents rating park grounds as well maintained.

Historical data for some of the metrics below was provided by the City Auditor's Annual Resident Survey, which was discontinued in 2016. New surveys are in development that will provide future data to evaluate performance within this program offer.

The bureau is currently working to develop park maintenance standards, which should provide additional data in the future.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percent of residents rating park grounds as well maintained	N/A	N/A	N/A	0	85%

Explanation of Services

Parks exist to provide access to safe and healthy landscapes in the city. Portlanders want access to recreation and nature. Park Maintenance provides the daily care of parks that make them safe each day. Planning and daily maintenance also ensure that physical and living assets are maintained and sustained for future generations.

Park Maintenance services include:
-Inspecting and repairing playgrounds and playground equipment;
-Opening and cleaning restrooms;
-Removing garbage and litter;
-Clearing and cleaning pathways and benches;
-Repairing plumbing and lighting infrastructure;
-Cleaning and repairing athletic courts and fields;
-Operating hundreds of irrigation systems;
-Maintaining the health of grass, trees, and ornamental landscapes from neighborhood parks to world-class venues like the Hoyt Arboretum and the Washington Park International Rose Garden;
-Cleaning sites of vacated homeless camps;
-Preparing for and cleaning up after permitted events; and
-Maintaining and operating various heavy equipment specific to park maintenance.

Parks Maintenance is assisted by community volunteers who contribute tens of thousands of volunteer hours in parks, improving the conditions of cleanliness and plant care. Park Maintenance staff meet regularly with neighborhood park coalitions to solicit feedback on park maintenance and improvements.

Equity Impacts

This program supports PP&R's Five-Year Racial Equity Plan and other bureau goals related to racial and disability equity by providing maintenance services throughout the city, at all city parks. The program staff focus on pathways, restrooms, benches, and other assets needing daily care to ensure that safe access to these basic services are free of additional barriers to those with limited abilities.

Changes to Program

In the FY 2019-20 Adopted Budget, PP&R reduced funding for mowing of non-athletic fields, turf repair, and leaf collection. PP&R anticipates that it will reduce mowing, turf repair, and leaf collection by 8% and trim mowing by 13%. This budget reduction may impact the health and appearance of turn and the timeliness of litter and leaf cleanup.

PP&R also reduced support for training, sustainable landscapes, and materials and services associated with Park Maintenance. This budget reduction is realized partially in Park Maintenance and partially in Business Services.

In the FY 2019-20 Adopted Budget, Park Maintenance has received $300,135 in ongoing funding to support operations and maintenance at new parks and other assets.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	14,958
External Materials and Services	0	0	-25,000	4,280,174
Internal Materials and Services	0	0	0	1,905,629
Personnel	0	0	25,000	11,723,540
Fund Expense				
Contingency	0	0	0	139,291
Fund Transfers - Expense	0	0	0	500,000
Ending Fund Balance	0	0	0	129,500
Sum:	**0**	**0**	**0**	**18,693,092**
FTE	0	0	0	109.8

Resources: The Parks Maintenance program is funded almost entirely through General Fund, with some support from other agencies to support the upkeep of their grounds. In the FY 2019-20 Adopted Budget, to improve budget planning and monitoring, PP&R separated maintenance functions into three Program Offers: Facility & Amenity Maintenance, Natural Area Maintenance, and Park Maintenance. This change explains the lack of historical data in the Park Maintenance Program budget.

Expenses: This program is approximately 65% personnel and 35% materials and services. Work is conducted by field staff, both regular staff and casual staff (Seasonal Maintenance Workers for peak season). Materials and services are needed for vehicles, equipment and landscape materials, and supplies.

Staffing: Parks Maintenance relies on 110 full-time field employees, supported by a staff of approximately five management and administrative staff. The program hires about 40 seasonal maintenance workers each year, who work between 800-1400 hours each. Staff work multiple shifts (day and swing) seven days a week. Positions have only been added when new parks are built and newly allocated operations and maintenance funding has become available to account for the care of these new parks.

Assets and Liabilities: The Parks Maintenance program oversees 146 developed parks including over 3,500 acres of land.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Tonya Booker

Contact Phone 503-823-5463

Property

Program Description & Goals

Portland Parks & Recreation (PP&R) manages more than 1,200 acres of parkland, and more than 100 structures with the goal of delivering a range of parks and recreation services to a diverse array of users. To fully utilize these assets, while also managing user expectations and resolving potential conflicts, the Property program issues permits, manages contracts, drafts partner agreements, negotiates business deals, manages acquisitions and dispositions, and leads strategic partnerships.

As the City's parks and recreation demands change, the bureau may acquire and dispose of property to align with changing needs. The Property program provides the expertise to manage this real estate activity. Select outcomes of the Property program are to:
-activate PP&R property through mission-aligned partnerships;
-generate revenue from fees paid by private users of public space; and
-manage the total inventory of PP&R property to support the delivery of parks and recreation services to all Portlanders.

The Property program also includes the bureau's Asset Management program, which does the following:
-implements best practices for the bureau to manage its $1.5 billion built and natural infrastructure portfolio through the full lifecycle
-manages of the bureau's 20-year, $1 billion Capital Improvement Program
-optimizes infrastructure resources by using data and equity screens to make decisions.

The Health Safety and Environment function includes 2 FTE positions within the Property program. This program mitigates risk to the public and staff by identifying and abating existing environmental hazards (e.g. asbestos, lead-based paint, and radon) within PP&R's asset portfolio, ensuring regulatory compliance with OSHA standards and promoting a safety conscious culture.

Specific performance metrics for this program offer have not yet been identified. Program metrics for all bureau programs are under review.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Property program issues permits, manages contracts, drafts partner agreements, negotiates business deals, manages acquisitions and dispositions, and leads strategic partnerships.

The Asset Management program provides the following:
-Assesses condition of assets and facilities;
-Manages the decision-making project selection process of the bureau's Major Maintenance program and budget (with equity screens);
-Supports PP&R operations with mandatory sidewalk inspections, work-order flow, utility locate screening, asset information collection, investigations, and management;
-Strategizes about infrastructure management and funding including Citywide processes; and
-Improves asset and facility condition through identification of asset portfolio management strategies.

Equity Impacts

The Property program has large and direct impacts on equitable delivery of PP&R services. Which uses are allowed in parks, how deeply they are subsidized by the General Fund, and where they are allowed all have impacts on communities of color and underrepresented groups. How permit fees are structured – particularly for individual uses – can have an impact on access and utilization of public resources. One area of concern is equitable access to Property program resources – particularly with regard to time available to negotiate and manage partnerships. A great deal of the Property program's time is dedicated to existing legacy partnerships - this limits the program's ability to develop new partnerships that better reflect the community PP&R serves today.

Changes to Program

With lack of capacity and funding, PP&R has determined the property team needed to suspend the Parks Proposal program until further notice. This program included intensive staff support and bureau funding for community led and requested projects. The impacts of this suspension are no single point of contact or source of tracking requests and the bureau is fielding requests throughout the organization. The Parks Proposal program was a tool to provide a direct line between the community and PP&R to request enhancements and new amenities to existing bureau assets.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,530,675	1,504,958	2,156,344	1,866,833
Internal Materials and Services	-1,046,376	-1,228,304	-987,852	-1,645,537
Personnel	804,070	1,087,614	1,215,067	1,515,651
Sum:	**1,288,369**	**1,364,268**	**2,383,559**	**1,736,947**
FTE	11	10.75	11.75	12

Resources: Overall, the Property program earns more revenues than it spends in expenses, thus offsetting the need for General Fund support. Revenues are primarily generated through non-parks use permits for construction and other temporary encroachments on parks property, lease and concessionaire payments, disposition proceeds, and other miscellaneous revenue.

Expenses: Ongoing expenses include staff costs and materials and services. The expense budget in internal materials and services includes a large negative offset that reflects a transfer of funds from Washington Park parking revenues. to support services in Washington Park.

Staffing: The Property program has six staff directly responsible for agreements, contracts, partnerships, and acquisitions and dispositions while the Asset Management program has five staff. The Health Safety and Environment program currently includes 2 FTE.

Assets and Liabilities: Despite managing use of PP&R properties, the Property program isn't responsible for the day-to-day maintenance and operation or the long-term major maintenance and replacement of significant assets. All facilities and fleet used by Property staff are managed by the City. All replacement is funded through rates paid to the central service providers.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Zalane Nunn Petersen
Website:	portlandparks.org	**Contact Phone**	503-823-5229

Aquatics Program

Program Description & Goals

Portland Parks & Recreation's (PP&R) Aquatics program is part of the bureau's Recreation Services Division. Recreation services foster connections to self and community – learning, playing, and growing together - through wellness activities, lifelong education, skill development, and community building. The Aquatics program provides water safety skills and awareness, as well as job training and employment for Portlanders. The program provides a safe environment for developing swimming and water safety skills, and engaging in healthful activities.

PP&R owns, maintains, and operates 12 aquatics facilities (five indoor and seven outdoor pools). Four of the five indoor pools are within a community center. In addition to swim pools, the Aquatics Program includes beaches, spray parks, and fountains. Aquatics programs and facilities are important to Portland residents. They provide safety, health, and recreation benefits to residents of all ages, helping make Portland a family-friendly and livable city. They are places for families and members of the community to build skills and interact in play, sport and general fitness; they offer therapeutic facilities and opportunities to learn water safety – an important life skill in a state with hundreds of miles of ocean beaches and a multitude of lakes and waterways.

In 2017, PP&R served one million swimmers and 28,155 swim lessons. The Aquatics program has received numerous awards including the national "Excellence in Aquatic" award from the National Recreation and Park Association. The Aquatics program's key goals are for PP&R to provide:
-a broad range of aquatic experiences and opportunities available to all;
-increasing participation by people of color in aquatics programs;
-partnerships to build the capacity of culturally-specific community organizations to increase access to programs, services and activities;
-environmentally-responsible aquatic facilities; and
-facilities and programs that are well-managed and economically viable.

Desired outcomes:
-Opportunities for aquatic experiences are distributed equitably throughout the city.
-Residents enjoy increased health and fitness due to participation in aquatic recreation.
-Family-friendly facilities meet leisure, therapy, competition, fitness, and education needs.
-Improved water safety skills results in fewer accidents and deaths.
-A sense of community develops as aquatic facilities provide places for social interaction.
-Adequate facilities exist to meet current and future needs in a financially sustainable way.

Specific performance metrics for this program offer have not yet been identified. Program metrics for all bureau programs are under review.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

All aquatics facilities, including beaches, spray parks, fountains, and swimming pools offer opportunities for unstructured play and interactive recreation. However, only indoor and outdoor pools provide lessons, lap swim, competition, and therapy.

Aquatic recreation services fall into the following categories:
-Water Safety: Outreach and community events to provide life-saving skills and beginning level swim lessons.
-Exercise, Health, and Fitness: Group exercise classes and lap swim times are available for drop-in participation, low impact classes, and spas available for therapy.
-Play: Unstructured and interactive access to PP&R pools and splash pads
-education and skill development: lifeguard and swim instructor training certifications; competitive and swim teams, and intermediate - advanced level skill development.

Creating a safe, enjoyable, and cost-effective aquatics environment is a complex undertaking. The design of the natatorium, access, parking, storage, deck space, specific amenities, and equipment condition all directly affect the operation of pools. Staffing requires a substantial and flexible workforce so that required lifeguard levels, as well as swim instructors, water fitness instructors, and other roles can all be modified throughout the day based on program needs and drop-in activity. Special equipment is needed to serve people with physical disabilities. Pool chemistry must be monitored on a continuous basis and systems adjusted as needed to ensure safety, health, and comfort.

Pools have large fixed costs, with variable costs depending on the programs and participation levels. Service delivery requires clear priorities and continuous balancing of the needs and preferences of a highly variable group of users, from daily individual swimmers, swim lesson students, fitness participants, and other users. Aquatics staff research and participate in best practice development for parks and recreation aquatic systems management.

Equity Impacts

Increase access for marginalized communities: PP&R's Strategic Plan for the Aquatics program focuses on increasing access for marginalized communities that did not have access to swimming in the past. The Aquatics program is undertaking a comprehensive effort to increase water safety awareness, swimming participation, and employment of people of color in Aquatics. The Aquatics program is working to improve the cultural responsiveness and understanding of institutional racism and its impacts. The program is partnering with and building the capacity of community organizations accountable to communities of color and refugee and immigrant communities to increase access to programs, services, and activities.

Accessibility: Nine of the twelve aquatic facilities are accessible to people with disabilities. The Aquatics program offers swim lessons for children and adults with disabilities, as well as water fitness and play swim times designed for swimmers with special needs.

Access to employment: Resources are dedicated to Aquatic hiring that continue to improve the program's diversity to better reflect the community it services. The Aquatics program has made significant shifts in hiring through outreach, job pipeline programs, and access to employment.

Access to water safety skills: Portland has seen tragic loss of young lives from the lack of access to water safety for communities of color and immigrant and refugee communities. The emphasis on removing barriers to participation in swim lessons and aquatic services will have real life consequences. In recent years, the Aquatics program has partnered with Equity & Inclusion, Portland Public Schools, and Portland Opportunities Industrialization Center to target outreach and educational services to promote swim lessons and build a pipeline for a more diverse workforce. To the extent that youth have not grown up around swimming or pools, there are significant barriers to starting in adolescence. This increases the priority for increasing participation in aquatics at an early age.

Changes to Program

In the FY 2019-20 Adopted Budget, PP&R has reduced funding for large community centers by $2.1 million. In order to realign its operating model to create access, programming, and staffing consistency that supports the delivery of core recreation services in a financially sustainable manner. To do so, PP&R identified the core costs of operating its centers with basic, drop-in use, and then added in programs that maximize service delivery within a defined staffing model.

The realignment of large community centers will impact FY 2019-20 funding for the Aquatics Program and will result in a net staffing reduction of 3 FTE.

The FY 2019-20 Adopted Budget eliminated ongoing funding for Columbia Pool, but includes one-time funding to keep the pool open through June 30, 2020. This funding offers PP&R time to identify alternative approaches for meeting high priority needs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,262,471	1,119,615	836,676	849,056
Internal Materials and Services	109,238	110,819	141,417	131,271
Personnel	5,028,877	5,751,975	5,314,611	6,148,249
Sum:	**6,400,586**	**6,982,409**	**6,292,704**	**7,128,576**

	FTE	57.75	59.15	33.5	30.5

Resources: The Aquatics program receives very little support from the City's General Fund with about 90% its operation supported by program fees. Fees have not kept pace with significant increases in the program's cost structure and the result has been the development of a structural gap for revenue dependent program like Aquatics. The program also receives revenue from the Portland Water Bureau to maintain the City's decorative fountains.

Expenses: The primary expenses of the program is personnel (full-time and part-time seasonal staff) and operating expenses for equipment and maintenance repairs.

Staffing: The FY 2019-20 Adopted Budget funds 30.5 FTE (a net staffing reduction of 3 FTE) in the Aquatics budget, including a Supervisor II, a Maintenance Supervisor, 24 Coordinators and Leaders and four pool maintenance staff. The Maintenance Supervisor supervises the four pool maintenance staff and the three full-time fountain staff, that are paid out of the fountain budget. The maintenance crew also has two seasonal maintenance workers. The Aquatic department's seasonal staff fluctuates between 350 for fall, winter, and spring and 800 for summer.

Assets and Liabilities: The key assets that are owned and operated by the Aquatics program are the swimming pools and all the equipment that is needed to operate a successful swim program. The pools and equipment are currently in fair working order. The maintenance staff has maintained the equipment to meet State regulations, within a limited budget. PP&R has one pool that was built in 1940 (Pier Pool) and hasn't had significant repairs to the shell or mechanical equipment. Older equipment and assets have an increase chance of failure without renovation. There are also numerous pumps, motors, waterslides, play/spray features, and ADA equipment that are nearing the end of their lifetime and will need to be renovated or replaced within the next 10 years.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Maximo Behrens

Contact Phone 503-823-5103

Arts

Program Description & Goals

Portland Parks & Recreation's (PP&R) Arts program is part of the bureau's Recreation Services Division. PP&R's recreation services foster connections to self and community—learning, playing, and growing together—through wellness activities, lifelong education, skill development, and community building.

The Arts program enhances quality of life and activates play through creative self-expression, imagination, and celebration. Access to services and spaces that support cultural, ritual, and artistic practices build social networks and break down isolation and disconnection. Cross-community relationships are strengthened, resulting in more cohesive, resilient communities. Culturally-relevant arts programs empower historically marginalized communities, particularly low-income people or people of color, as creators, artists, and community builders. To that end, PP&R's Arts program is designed to bring people together and promote positive self-expression, communication skills, social/emotional development, and skill-building.

The Arts Program's key goals are to:

-directly express values of equity, diversity, and inclusion;
-provide a platform for Portlanders to celebrate their diverse cultures, heritage, and identities; and
-bridge understanding and promote dialogue across communities in safe and welcoming environments.

Desired outcomes:

-Programs are an effective vehicle for advancing equity.
-Increase access to recreation programs for all Portlanders, with a special focus on teen, culturally diverse, and low-income populations.
-Increase civic engagement for underrepresented communities.
-Promote positive social identity.
-Provide welcoming spaces for social interaction and community use.
-Demographics of workforce, from service delivery to leadership, reflect the diversity of the Portland community.

Specific performance metrics for this program offer have not yet been identified. Program metrics for all bureau programs are under review.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

PP&R provides affordable arts classes (with scholarship availability) and arts spaces for community use. Introductory arts classes are provided at community centers across the city. Introductory and intermediate art classes are provided at PP&R's three specialized arts centers, which have a regional draw as well as a neighborhood base.

Arts programs fall into these categories:
-Registered Fine and Performing Arts Activities: Art classes serve all ages - toddlers, youth, teens, adults, and seniors. Art forms and offerings are wide-ranging, including music, dance, theatre, visual arts, crafts, and creative writing
-Fine and Performing Arts Spaces: The arts centers—Multnomah Arts Center, Laurelhurst Dance Studio, and the Community Music Center—provide performance, rehearsal, and office spaces for community organizations and artists through hourly rental and long-term leasing
-Community Events: Arts centers organize and host a variety of art events and performances open to the community.

Equity Impacts

Outreach Programs: PP&R's specialized arts centers are in affluent and/or gentrifying neighborhoods. As lower-income families and communities of color are displaced and move outward, accessing PP&R's arts offerings becomes more difficult. To address this issue, PP&R has developed outreach programs to take arts activities and classes to underserved families where they are. These programs are developed in partnership with nonprofits (Rosewood Initiative, Home Forward) and culturally specific groups (Young Gifted and Brown/Black, Somali community).

City of Portland Affordable Arts Space Plan: PP&R is making space available at its arts centers below market rate to arts organizations, artists, and nonprofits, prioritizing communities of color, and persons with disabilities.

Access to Employment: Resources are dedicated to recreation hiring that continue to increase the racial diversity of our workforce.

Racial Equity Plan initiative - PREP (Parks Race and Ethnicity Project): This initiative will gather information about current users and will help determine who PP&R is reaching and who it is not.

Racial Equity Plan initiative - Culturally Responsive Programming: Culturally specific events and programs involve corresponding communities in the planning and production.

Changes to Program

In PP&R's FY 2019-20 Adopted Budget, arts programming has been reduced at Charles Jordan, East Portland, Hillside, Matt Dishman, Mt. Scott, and Southwest Community Centers. These reductions are part of PP&R's restructuring of programs at large community centers, the transitioning Hillside Community Center, and the closure of Sellwood Community Center.

In addition, PP&R will implement a model change at Community Music Center (CMC) and Laurelhurst Dance Studio. At CMC, the supporting nonprofit, CMC, Inc. has committed to increase its contribution to bridge a budget gap and has agreed to modify its partner agreement with PP&R. CMC will test a new staffing model that reduces PP&R staff from two to one, with an increase in Recreation Support staff hours.

For FY 2019-20, PP&R will eliminate the dance program at Laurelhurst Dance Studio and explore opportunities for other arts organizations to use the space through a lease agreement or other model.

The budget reductions will mean a net staffing reduction of 2.75 FTE.

The FY 2019-20 Adopted Budget includes one-time funding to keep the Multnomah Arts Center open through January 2021, while PP&R develops a new business model that is financially sustainable.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	254,855	201,024	189,632	171,060
Internal Materials and Services	96,272	180,913	45,641	56,069
Personnel	1,698,640	1,642,185	1,861,923	2,094,927
Sum:	**2,049,767**	**2,024,123**	**2,097,196**	**2,322,056**
FTE	9.39	16.15	14.25	11.5

Resources: The Arts program historically receives very little support from the City's General Fund. Fees have not kept pace with significant increases in the program's cost structure and the result has been the development of structural gap for revenue dependent program like Arts.

Expenses: Expenses total $2.3 million and are predominately staff related. The increase in personnel costs is a result of a change in the program offer structure - trust fund transfers are now included.

Staffing: The Arts program currently includes 11.5 FTE (a net staffing reduction of 2.75 FTE) and relies heavily on seasonal staff resources.

Assets and Liabilities: Arts programs are offered at eight of the bureau's community centers, but the majority of programming occurs at Community Music Center (CMC) and Multnomah Arts Center (MAC). Both CMC and MAC have large deferred maintenance and seismic retrofitting needs. The bureau does not currently have resources to address these critical needs.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Maximo Behrens
Website:	portlandparks.org	**Contact Phone**	503-823-5103

Community and Socialization

Program Description & Goals

The Community and Socialization program is part of the Portland Parks & Recreation's (PP&R) Recreation Services and Land Stewardship Divisions. PP&R's recreation services are about recreating ourselves - about learning, playing, growing, and connecting through wellness activities, lifelong education, and community. PP&R's Environmental Education programs, in the Land Stewardship Division, offer diverse environmental experiences in our city's parks and natural areas. Enrichment activities, such as job skills training and employment, educational and out of school time services for youth, community events, facility rentals and related services, and lifelong learning opportunities, bring people together who may not otherwise cross paths.

Community and Socialization's key goals are to provide:

-a broad range of recreation activities to City of Portland residents;
-increased access to, and participation by, underserved communities, specifically communities of color and individuals with disabilities;
-access to available facilities and resources for community use;
-an accessible employment pipeline with professional development opportunities for youth; and
-opportunities for Portland residents to connect to nature through hands-on ecology, stewardship, and exploration in parks and natural areas.

Desired outcomes of this program are as follows:
-Service opportunities are distributed equitably throughout the city.
-Services provide exposure to new experiences and opportunities to grow.
-Services are responsive to, and inclusive of, diverse communities.
-Residents enjoy increased health and fitness due to participation.
-Residents gain an appreciation for our parks and natural areas through direct experience.
-Adequate facilities exist to meet current and future needs.
-Facilities provide welcoming spaces for social interaction and community use.
-Demographics of workforce, from service delivery to leadership, reflect the diversity of the Portland community.

Specific performance metrics for this program offer have not yet been identified. Program metrics for all bureau programs are under review.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Community and Socialization programs fall into these enrichment categories:

-Educational and Out of School Time Services for Youth: PP&R offers environmental education at park locations across Portland, educational preschool programs in nine community centers, four after school programs in community centers, and eleven SUN Community Schools located within four school districts. Camp activities are provided citywide for youth ages 3-14 during spring, summer, and winter school breaks.

-Community Events: Recreation centers and programs offer a variety of special events to bring together community. These include singular events like the Matt Dishman Block Party, the Charles Jordan Penny Carnival, and hosting the Native American Marketplace at Mt. Scott Community Center, as well as larger sponsor and partner supported activities like Summer Free For All (SFFA) movies and concerts and the Lunch + Play sites.

-Facility Rentals and Related Services: PP&R provides venues and resources for Portlanders to create their own experiences and bring their communities together.

-Enrichment and Lifelong Learning: PP&R designs, develops, and delivers a broad range of activities that include physical, social, and educational development for all ages. Environmental Education offers classes, guided walks, camps, volunteer opportunities, naturalist training, trail/tree maintenance jobs, and special events focused on the stewardship and connection to our forest, grassland, and water ecosystems. These services are complimentary to programs offered in Arts, Sports and Games, Aquatics, and Community Engagement.

-Community Engagement: PP&R engages with the community to help define activities and programs through a variety of means, including customer surveys and direct feedback; partner with culturally specific organizations; maximize the cultural diversity of service providers and employees; and market directly to underserved communities.

Equity Impacts

PP&R is guided by a Five-Year Racial Equity Plan. Two initiatives from this plan affect Community & Socialization:

-PREP (Parks Race and Ethnicity Project) gathers information about current PP&R program users and will be used to help determine who is being served and who is not.
-Culturally Responsive Programming: Culturally specific events and programs are created in concert with communities. An example is SFFA's movie and concerts. These events are organized in partnership with community groups. Each group hosts an event—choosing their park location, selecting the movies and music, and bringing people together from their community. In 2018, SFFA diversified its community partnerships, including: APANO (Asian Pacific American Network of Oregon), Black Parent Initiative, Bollywood Dreams, the Tongan Community, and Young Gifted and Brown (YGB Portland). For PP&R's Free Lunch + Play, sites are selected based on greatest need (in parks in areas where more than 50% of students receive free and reduced school lunches). Mobile Play is a program within Free Lunch +Play that brings activities to kids in apartment complexes in areas that are park-deficient in east Portland. Site locations and program design are determined in partnership with an advisory committee made up of east Portland community members and organizations.

Resources are dedicated to Recreation and Land Stewardship (Environmental Education) hiring practices to ensure the workforce is more reflective of the community it serves. Community and Socialization programs have made significant shifts in hiring through outreach, job pipeline programs, and access to employment. These programs attract and hire from a diverse applicant pool that gains mentorship and guidance in career development, leading to seasonal and/or full-time employment.

Changes to Program

In the FY 2019-20 Adopted Budget, PP&R has reduced funding for Large Community Centers by $2.1 million. In order to realign its operating model to create access, programming, and staffing consistency that supports the delivery of core recreation services in a financially sustainable manner. To do so, PP&R identified the core costs of operating its centers with basic, drop-in use, and then added in programs that maximize service delivery within a defined staffing model.

This realignment will reduce the number and diversity of registered activities and special events. The following types of activities will be scaled back or discontinued: summer camps, special events, single day camps, some morning pre-school swim lessons, league competitions, and drop-in child care at Southwest Community Center.

The realignment of large community centers will impact FY 2019-20 funding for the Community and Socialization Program. In addition, budget reductions at small community centers, including Montavilla Community Center (reduced as part of the realignment of Teen Services), impact Community and Socialization. These reductions will include a net staffing reduction of 14.56 FTE.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,422,337	3,571,237	3,260,812	993,992
Internal Materials and Services	660,932	414,364	551,791	377,992
Personnel	11,404,300	13,152,558	12,957,465	6,611,094
Fund Expense				
Contingency	0	0	100,143	1,838
Fund Transfers - Expense	0	78,000	60,000	0
Sum:	**15,487,569**	**17,216,160**	**16,930,211**	**7,984,916**
FTE	150.59	140.67	107.58	47.95

Resources: The Community and Socialization program receives about one-third of its resources from the General Fund. The remaining support is from program fees. Budget and staffing levels for FY 2019-20 have been reduced, but not at the dramatic levels shown in the Program Budget. A new Program Offer, Recreation Facilities Operations, was created and resources and staffing were split between Community and Socialization and Recreation Facilities Operations.

Expenses: Total expenses are projected at $8.0 million for FY 2019-20. This is down from prior years due to a change in program structure - recreation facility operations has been moved from Community and Socialization starting in FY 2019-20.

Staffing: The Community and Socialization program includes 47.95 FTE positions (a net reduction of 14.56 FTE), predominately for services provided within SUN schools, Preschool, and Environmental Education. A new Program Offer, Recreation Facility Operations, was created and resources and staffing were split between Community and Socialization and Recreation Facilities Operations. Other staffing positions are accounted for in Recreation Facility Operations.

Assets and Liabilities: Many of the services originating from the Community and Socialization program are provided at PP&R's community centers, some of which have significant deferred maintenance needs. The bureau does not currently have resources to address these critical needs.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Maximo Behrens
Website:	portlandparks.org	**Contact Phone**	503-823-5103

Recreation Facility Operations

Program Description & Goals

Recreation Facility Operations provides the basic operating platform for the delivery of recreation programs, services, and opportunities. It includes the staffing, materials, and services necessary to open the doors at community centers and welcome the public to urban plazas and park programs, as well as the systems that support service delivery. It also includes a portion of management and supervisory costs and the staff that manage the compilation and presentation of tens of thousands of recreation programs to the community.

Much of the work of Recreation Facility Operations has to do with front desk functions at community centers, including managing customer accounts, facilitating visitor access, registering guests in classes, and coordinating rentals; managing the lobby environment and other shared public spaces; and maintaining safety. Summer Free for All (SFFA) programs are supported by the year-round staff who oversee the program design, engage community stakeholders, service providers, and artists; steward sponsors; organize logistics, etc. Urban Parks staffs and programs Gateway Discovery Park to activate it as a gathering space and cultural venue and supports rentals at Director park and Holladay Park.

Recreation Operation's key goals are to provide:

-Community access to available facilities and resources;
-Efficient use of resources to create the highest value for the community; -Quality and consistent customer experiences; and
-Effective leadership, training, and resources for staff to deliver quality programming.

Desired outcomes for this program are as follows:

-Services are distributed equitably throughout the city.
-Services provide exposure to new experiences and opportunities to grow.
-Services are responsive to, and inclusive of, diverse communities.
-Residents enjoy increased health and fitness due to participation.
-Adequate facilities exist to meet current and future needs.
-Facilities provide welcoming spaces for social interaction and community use.
-Demographics of workforce, from service delivery to leadership, reflect the diversity of the Portland community.

Bureau performance measures tracked that are relevant to this program include: the percent of participants who rate their experience as good or very good; the percent of participants who rate program affordability as good or very good; and the percent of participants receiving financial assistance.

Performance metric data for FY 2018-19 will be available in fall/winter of 2019. Historical data for some of the metrics below was provided by the City Auditor's Annual Resident Survey, which was discontinued in 2016. New surveys are in development that will provide future data to evaluate performance within this program offer.

Other performance indicators include hours of operation and ability to meet demand during peak times (e.g. for gyms, fitness centers, classes, etc.) and the ability to generate sufficient revenue to cover expenses in conjunction with General Fund resources. Recreation Services is expected to generate over $16 million in program revenue, most of it through facility programming.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of residents rating program affordability as good or very good	N/A	N/A	N/A	0	80%

Percentage of total participants receiving financial assistance	7%	7%	7%	7%	7%
Percentage of participants who rate their experience as good or very good	N/A	N/A	N/A	0	96%

Explanation of Services

Resources budgeted in Recreation Facility Operations include basic operations for:

- 9 Community Centers (Charles Jordan, East Portland, Matt Dishman, Mt. Scott, Southwest, Peninsula Park, St. Johns, Woodstock, Montavilla);
-3 Arts Facilities (Multnomah Arts Center, Community Music Center, IFCC);
-Summer Free For All (Movies, Concerts, Free Lunch + Play); and
-Urban Parks (Gateway Discovery Park).

Recreation Facility Operations is a staff-intensive program that includes front desk staff and facility attendants; supervisors of front line programs and facilities; and recreation staff time to meet identified facility operation and staff support needs.

Equity Impacts

PP&R is guided by a Five-Year Racial Equity Plan. Two initiatives from this plan affect Recreation Operations:

-PREP (Parks Race and Ethnicity Project) gathers information about current PP&R program users and will be used to help determine who is being served and who is not.
-Culturally Responsive Programming: Culturally specific events and programs are created in concert with communities.

Resources are dedicated to recreation hiring practices to ensure the workforce is more reflective of the community it serves. Recreation Facility Operations has made significant shifts in hiring through outreach, job pipeline programs, and access to employment. These programs attract and hire from a diverse applicant pool that gains mentorship and guidance in career development, leading to seasonal and/or full-time employment.

Changes to Program

Recreation Facility Operations is a new Program Offer. In the FY 2019-20 Adopted Budget, PP&R has reduced ongoing funding for the following programs included in Recreation Facility Operations:

-Reduce Relay Resources (Janitorial Contract): reduce janitorial contract and prioritize safety, hygiene, and positive customer experiences;
-Realign Urban Parks Programming: eliminate fine arts programming and dedicated staff at Director Park and Holladay Park, but maintain park rentals;
-Realign Large Community Centers: create a new business model that optimizes access, programming, and staffing at PP&R's five large community centers;
-New models or changes at Small Community Centers: Peninsula Park staffing reduction, Sellwood Community Center closure, and seeking new operating partnerships for Hillside Community Center; and
-Consolidate Citywide Recreation and Recreation Support Services.

The FY 2019-20 Adopted Budget will include a net staffing reduction of 12 FTE in Recreation Facility Operations.

In the FY 2019-20 Adopted Budget, PP&R is receiving $150,000 in one-time funding for revenue stabilization to continue supporting a staff position that will manage and monitor bureau-wide revenue generation during this time of transition. PP&R is also receiving $250,000 in one-time funding for operation contingency to address the uncertainty associated with the significant service level transitions include in this budget.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	1,543,150
Internal Materials and Services	0	0	0	380,783
Personnel	0	0	0	4,215,825
Sum:	**0**	**0**	**0**	**6,139,758**
FTE	0	0	0	33.56

Resources: The Recreation Facility Operation program is supported 50% from the City's General Fund and 50% from program fees. Fees have not kept pace with significant increases in the program's cost structure and the result has been the development of a structural gap. Recreation Facilities Operations is a new Program Offer, so there is no available historical data.

Expenses: Total expenses for the program are projected to be $6.1 million in FY 2019-20 with $4.2 million needed to support staffing costs.

Staffing: The Recreation Facility Operation program include 33.56 FTE positions, a net staffing reduction of 12 FTE.

Assets and Liabilities: Services delivered are at PP&R's community centers, some of which have significant deferred maintenance needs. The bureau does not currently have resources to address these critical needs.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Maximo Behrens
Website:	portlandparks.org	**Contact Phone**	503-823-5103

Sports and Games

Program Description & Goals

The Sports and Games program is part of the bureau's Recreation Services Division. PP&R's recreation services foster connections to self and community – learning, playing, and growing together - through wellness activities, lifelong education, skill development, and community building. Sports and Games contributes to this mission by offering affordable and accessible health and wellness opportunities for all, with a focus on eliminating health disparities in Portland. The Sports and Games program offers basketball, soccer, gymnastics, tennis, golf, skateboarding, fitness, and other classes as well as league play, 5K fun runs, clinics, matches and meets. It includes the Portland Tennis Center and partners with others to provide classes and clinics at outdoor courts. Sports and Games also contains enterprise fund programming, including PP&R's Golf Program and the Portland International Raceway.

Overall demand for access to sports programs and facilities is trending upward, especially for gyms and fields. Fitness centers in full-service community centers include thousands of visits each week and peak times have more demand than space or equipment. Group exercise classes must monitor room maximums for patron safety. There are often customers who are not able to access the classes they desire due to space capacity.

Program success is tracked through program registration, service hours, class occupancy rates, and revenue generation. Overall access is greatly expanded through a longstanding collaborative agreement with Portland Public Schools. Partnerships with Portland Metropolitan Softball Association, Portland Youth Soccer Association, Oregon Rugby, and others increase the ability to offer sports leagues across the system.
Sports and Games' key goals are to provide:

-a broad range of recreation activities to City of Portland residents;
-increased access to, and participation by, underserved communities, specifically communities of color and individuals with disabilities;
-access to available facilities and resources for community use; and
- an accessible employment pipeline with professional development opportunities for youth.

Desired outcomes of the Sports and Games program:

-Service opportunities are distributed equitably throughout the city.
-Services provide exposure to new experiences and opportunities to grow.
-Services are responsive to, and inclusive of, diverse communities.
-Residents enjoy increased health and fitness.
-Adequate facilities exist to meet current and future needs.
-Facilities provide welcoming spaces for social interaction and community use.
-Demographics of workforce, from service delivery to leadership, reflect the diversity of the Portland community.

Performance metric data for FY 2018-19 will be available in fall/winter of 2019.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Total number of golf rounds played (9 holes = 1 round)	310,299	335,491	345,000	345,000	350,000

Explanation of Services

Sports and Games programs fall into these categories:

-Sports Programs: includes the 90-year-old Saturday Youth Basketball program known as Goldenball, Portland Tennis Center, and the citywide 5K Run/Walk Series
-Registered Sports and Fitness Activities: registered classes at community centers, including sports classes for parent-child interaction, youth, and adults; fitness classes such as Zumba, yoga, Pilates; and martial arts such as Taekwondo and kickboxing
-Drop-in Sports and Fitness Activities: fitness center usage and classes; drop-in basketball, volleyball, open court tennis, skateboarding, bouldering, and ping pong
-Community Partnerships: includes special partnerships with the Blazers, the Timbers, US Tennis Association, and others

Equity Impacts

The Sport and Games program engages participants across ages, abilities, races, and cultures. Goldenball has a long history and fills a unique niche in providing opportunities for low-cost recreational basketball competition for boys and especially for girls. Support for the Sports and Games program is achieved through assistance from Adaptive & Inclusive Recreation. Efforts include providing financial assistance to youth, coordination with Schools Uniting Neighborhoods Service System to expand programming to underserved populations, and New Portlanders.

-Racial Equity Plan initiative - PREP (Parks Race and Ethnicity Project): This initiative will gather information about current users and be used to help PP&R determine who is being reaching and who is not.
-Racial Equity Plan initiative - Culturally Responsive Programming is developed in concert with communities to improve engagement and outcomes.

Resources are dedicated to recreation hiring that continue to increase the racial diversity of our workforce. PP&R has made significant shifts in hiring through outreach, job pipeline programs, and access to employment. This program meets PP&R strategic and equity goals through internal and external partnerships to target engagement with communities of color and refugee and immigrant communities. This program also contributes to equity by offering diversified opportunities for youth and others to build employments skills.

Changes to Program

In the FY 2019-20 Adopted Budget, the Sports and Games Program is impacted by the following reductions:

-Realign Large Community Centers: create a new business model that optimizes access, programming, and staffing at PP&R's five large community centers;
-New models or changes at Small Community Centers: Peninsula Park staffing reduction, Sellwood Community Center closure, and seeking new operating partnerships for Hillside Community Center.

The FY 2019-20 Adopted Budget will include a net staffing reduction of 10.75 FTE in Sports and Games.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	4,700,383	5,296,350	5,156,999	5,825,986
Internal Materials and Services	523,227	737,443	282,613	668,314
Personnel	7,097,828	7,004,523	7,006,460	7,541,195
Fund Expense				
Contingency	0	0	482,266	605,766
Debt Service	47,424	113,356	566,158	237,621
Fund Transfers - Expense	484,558	472,663	78,832	82,136
Ending Fund Balance	536,775	714,911	0	0
Sum:	**13,390,195**	**14,339,246**	**13,573,328**	**14,961,018**
FTE	55.5	58.15	61.6	44.55

Resources: The total General Fund support for the Sports and Games program is around $1.8 million, or around 10% of total expenses. The remainder comes from program fees.

Expenses: Total program expenses are $14.9 million, almost half of which are from the Golf Program.

Staffing: Total staffing is 44.55 FTE, mostly in the Golf Program. Sports and Games includes a net staffing reduction of 10.75 FTE.

Assets and Liabilities: Services delivered are at PP&R's community centers, Golf courses, Raceways, and in some cases Portland Public Schools, some of which have significant deferred maintenance needs. The bureau does not currently have resources to address these critical needs.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Maximo Behrens

Contact Phone 503-823-5103

Business Services

Program Description & Goals

Portland Parks & Recreation's (PP&R) Businesses Services program provides the operational infrastructure for the bureau and supports all programs and activities. The program contributes to the advancement of all outcomes of the PP&R Strategic Plan, with the most directly relevant outcomes including:

-increased diversity and training of the existing workforce;
-a safe environment for all employees and customers; and
-completion of the long-term vision plan that ensures a legacy of access to park, recreation, and tree-related services for future generations of Portlanders of all backgrounds and neighborhoods.

Bureau performance measure tracked that are relevant to this program include:

-total annual training hours completed
-Worker's Compensation Claims per 200,000 Hours Worked (100 Workers)
-percent of employees who feel they receive adequate job training and education
-percentage of employees who feel PP&R is making an effort to diversity its workforce
-percent of employees who feel safe behavior is a priority
-percent of employees who feel PP&R provides employees with adequate equity and cultural responsiveness training
-percent of employees who feel physically and emotionally safe at work
-people of color as a percentage of FTE

Most of the metrics listed below are part of the PP&R Employee Survey. Normally conducted annually, the survey was not implemented during 2018. It is expected to begin again in 2019. The number of workers compensation claims has decreased from 9.3 to 7.2 from Fiscal Year 2016-17 to 2017-18, due in part to the creation of a Training Coordinator position which allowed the bureau to more closely monitor training requirements and provide better communication about training opportunities. Employees of color as a percentage of total positions should at least reflect the percentage of Portlanders of color (28%). Performance metric data for FY 2018-19 will be available in fall/winter of 2019.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of workers compensation claims per 100 workers	9.30	7.22	8.00	8.00	7.00
Employees of color as a percentage of total positions	27%	29%	28%	28%	28%
Percentage of employees who feel PP&R is making an effort to diversify its workforce	83%	N/A	83%	83%	85%
Percentage of employees who feel PP&R provides employees with adequate equity and cultural responsiveness training	59%	N/A	59%	59%	65%
Percentage of employees who feel they receive adequate job training and education	58%	N/A	58%	58%	65%
Total annual training hours completed	1,125	2,226	2,500	2,500	2,500
Percentage of employees who feel physically and emotionally safe at work	68%	N/A	N/A	75%	83%

Percentage of employees that feel safety is a bureau priority	76%	N/A	85%	85%	85%

Explanation of Services

As currently structured, Business Services combines several disparate functions, including core support services such as workforce development, finance, stores and accounting, technology, safety, and performance and analysis; the leadership function of the various divisions and departments including division and department managers and their administrative support; and centrally located costs including utilities, facilities, insurance, etc. In the future, Business Services will be refined, realigned, and broken down to make its function and services more transparent.

Equity Impacts

As currently structured, Business Services represents leadership across the bureau and the core services that support the bureau. The most direct and critical function for achieving equity goals is workforce development, which coordinates the bureau's recruitment, training, and retention of employees. In addition, Business Services contains the positions associated with leadership in most divisions and departments. These two components make this program one of the most critical for developing a diverse workforce. In addition to workforce equity impacts, the division and department heads are critical to addressing inequities in the delivery of services and contracted services.

Changes to Program

In the FY 2019-20 Adopted Budget, PP&R eliminated three positions. PP&R also reduced support for training, sustainable landscapes, and materials and services associated with Park Maintenance. This budget reduction is realized partially in Park Maintenance and partially in Business Services.

In Business Services, The FY 2019-20 Adopted Budget provides $650,000 in one-time funding for PP&R's Large Community Center Transition. This supports summer programming and addresses the transition to a new operation model at the five large community centers. PP&R will realign operating models to create access, programming, and staffing consistency that supports the delivery of core recreation services in a financially sustainable model. The budget provides an additional $140,000 in one-time funding to support summer programming at Montavilla, Hillside, and Sellwood Community Centers.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	4,999	0	0	0
External Materials and Services	2,261,129	2,353,448	6,795,872	6,916,946
Internal Materials and Services	5,492,106	5,688,356	4,932,832	5,245,984
Personnel	7,724,853	8,124,208	9,797,706	8,225,093
Fund Expense				
Contingency	0	0	86,086,531	21,972,881
Debt Service	226,351	319,897	2,114,572	528,714
Fund Transfers - Expense	412,996	502,121	1,566,613	1,039,493
Ending Fund Balance	8,150,379	8,439,294	0	0
Sum:	**24,272,813**	**25,427,324**	**111,294,126**	**43,929,111**

	FTE	76.17	79.17	85.15	70.95

Resources: Operations of this program are primarily funded with General Fund discretionary, although System Development Charge collections which fund capital improvements are also budgeted in this program.

Expenses: The FY 2019-20 Budget includes almost $7.0 million in internal service costs including fleet, facilities, risk, technology, and printing; $2.4 million in utility costs; and $8.2 million in staff costs. This program is also where most fund balances are budgeted.

Staffing: 70.95 FTE positions are budgeted in this program (a net staffing reduction of 3 FTE). These positions are located throughout the bureau, primarily as leadership and administration in the various departments and divisions and as central functions including finance, workforce, safety, etc. Currently, the bond program and several capital positions are budgeted in the program.

Assets and Liabilities: While this program is not the primary owner of PP&R assets, it does own a large portion of the equipment assets of the bureau. The renewal of those assets is primarily funded through replacement reserve collections charged by the internal service bureaus. For example, Business Services owns all the desktop and laptop computers in the bureau. The Bureau of Technology Services charges PP&R an amount sufficient to replace those assets on a regular four to five-year cycle. This charge is included in the expense figure discussed above.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Claudio Campuzano
Website:	portlandparks.org	**Contact Phone**	(503) 823-4262

Planning

Program Description & Goals

Portland Parks & Recreation's (PP&R) Planning program provides organization-wide guidance for the planning, development, sustainment, modernization, and quality of built and natural infrastructure.

Major responsibilities include:
-Overseeing, developing, and renewing the Bureau's Vision Plan (2035 Vision Plan);
-Completing park, natural area, and regional trails master plans;
-Establishing sustainable and equitable service levels for park assets and making recommendations for parkland and trail system acquisition; and
-Developing policy and zoning code changes to benefit PP&R and advance equity objectives by assisting with the Bureau's Five-Year Racial Equity Plan.

The first two metrics listed below have been calculated annually for more than a decade. However, a severe data issue from the county has impeded their ability to gather tax lot information (needed for the calculation) and has left the bureau unable to calculate the metric for 2018. The issue is expected to be resolved in 2019, and FY 2018-19 performance metric data is expected to be available in fall/winter of 2019. The percentage of residents rating the closeness of their neighborhood park as good or very good was gathered from a 2017 Community Needs Survey. Another survey, smaller in nature, is expected to be completed in 2019 or 2020.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of residents living within three miles of a full-service community center	70%	N/A	70%	70%	70%
Percentage of residents living within one-half mile of a park or natural area	80%	N/A	80%	80%	81%
Percentage of residents rating the closeness of their neighborhood park as good or very good	83%	N/A	83%	0	83%
Number of miles of regional trails	157	158	158	158	160

Explanation of Services

The Planning program:
-Creates, manages, and oversees implementation of PP&R's 15-year Vision Plan;
-Establishes sustainable levels of service for PP&R assets (parks, trails, community centers, natural areas, pools, etc.), specifying what should be provided to residents over time;
-Completes park and trail master plans, working with the public on design plans, and engages underserved and hard to reach communities (with clear results from the recent 2017 Mill, Midland, and Division & 150th Park Master Plans);
-Negotiates land use deals with major developers and review land use applications; and
-Manages the decision-making project selection process of the bureau's Capital Improvement Program.

Equity Impacts

The Planning program works to achieve better equity outcomes by managing and directing PP&R's capital resources and the 2035 Vision Plan. Full funding of the 2035 Vision Plan will promote greater and more thorough outreach to communities of color, non-English speaking populations, and lower income residents, which will translate into desirable equity outcomes in the future park system. The Level of Service projects will ensure planned equitable access to park resources and facilities since they establish minimum target levels of service for all Portlanders, regardless of where they reside. An equity lens is used to identify areas of limited or nonexistent park service with higher than Citywide average concentrations of people of color, lower income, and youth. Equity is also considered in capital project funding selection, and is used to prioritize work and to provide new high-quality parks and recreation facilities in park-deficient areas. For example, condition assessments found asset deficiencies in lower income neighborhoods and prioritized them in the FY 2019-20 budget.

Changes to Program

The FY 2019-20 Adopted Budget eliminates one Planner position in the Assets & Development Division. This position is one of five planning positions, which are responsible for delivering several key strategic planning efforts currently underway.

The FY 2019-20 Adopted Budget provides $536,000 in one-time funding to support the development of the next long-range vision plan for PP&R. The bureau currently operates under the guidance of the Parks 2020 Vision. An update of this vision is needed to guide PP&R for the next 10-25 years.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	558,809	422,793	311,217	769,727
Internal Materials and Services	-300,635	27,547	26,342	30,272
Personnel	1,089,622	1,232,417	1,099,411	875,466
Fund Expense				
Contingency	0	0	142	
Sum:	**1,347,796**	**1,682,757**	**1,437,112**	**1,675,465**
FTE	5	9	7	6

Resources: The Planning program is supported by General Fund resources.

Expenses: The Planning program budget total $1.67 million for FY 2019-20.

Staffing: The program consists of 6 FTE positions (a net staffing reduction of 1 FTE).

Assets and Liabilities: There are no assets and liabilities associated with this program offer.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Lauren McGuire
Website:	portlandparks.org	**Contact Phone**	971-940-5538

Urban Forestry Science and Outreach

Program Description & Goals

Urban Forestry Outreach & Science program is committed to preserving and expanding the city's forest to all communities through fostering a culture of community tree stewardship, conducting scientific analyses of the urban forest, and developing and implementing best policy practices. Urban Forestry Outreach and Science also implements Title 11 Trees, the city's tree regulations, and supports tree code implementation by others including UF Permitting and Regulation, other bureaus, property owners, and residents. In recognition of the environmental, public health, and livability benefits of urban trees,

Portland has a goal of expanding canopy cover (the area of land covered by trees when viewed from above) from its current 30.7% to a minimum of 33.3% by 2035. Data is collected every 5 years and will be updated in 2020. In addition to the citywide canopy target, PP&R Urban Forestry is committed to addressing historic inequities which have resulted in strong correlations between access to tree benefits and income. The metrics listed below, annual trees planted in low canopy, low income neighborhoods, was created in 2018 to help track the progress of addressing the inequity. This performance measure will be updated in fall/winter of 2019.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of tree canopy coverage within city	N/A	N/A	N/A	0	31%
Annual trees planted in low canopy, low income neighborhoods	N/A	969	1,000	1,000	1,100

Explanation of Services

The Urban Forestry Division is guided by the Urban Forest Management Plan (UFMP). The plan is developed by City staff in collaboration with a broad and diverse stakeholder group including the Urban Forestry Commission, Oregon Department of Forestry, Metro, and other community organizations.

Adopted in 2004, the UFMP established the following goals of the Urban Forestry program:

-protect, preserve, restore, and expand Portland's urban forest;
-promote stewardship of the urban forest; and
-provide equitable urban forest benefits for all residents of the city.

Urban Forestry Outreach & Science program advances these goals through the following activities:

Forest Assessment: tree inventory and assessment, pest and pathogen management, GIS, canopy monitoring and mapping, analysis of potential city-wide tree canopy Title 11

Implementation: tree code analysis, policy and process development and improvement, Heritage Tree program, Approved Street Tree Lists, Title 11 reporting, Urban Forest Management Plan update, compliance tracking, TRACS data entry, Local Tree Care Providers list and training, permit specifications development, Title 11 trust funds

Planting: tree planting in parks, schools, rights-of-way and yards; young tree monitoring; contracts and procurement; citywide tree planting strategy

Education and Outreach: stewardship projects and volunteer management (14,000 volunteer hours annually), Arbor Day, workshops and trainings, Urban Forestry Commission education and outreach

Committee Communication: websites, permit handouts, newsletters, social media, web maps, press releases

Equity: Youth Conservation Crew, Neighborhood Tree Stewards, internships, Language Access Plan implementation, partnerships, Five-Year Racial Equity Plan implementation

Equity Impacts

Portland's urban forest is distributed inequitably across the city, with strong links to income, race, and ethnicity. In a survey conducted by PP&R in 2017, of 2,800 community members, more than 40% disagreed or strongly disagreed with the statement "My neighborhood has enough trees." Nearly 85% of respondents strongly agreed that "Portland's trees are important to me."

Lower-income neighborhoods on the east side of the Willamette River have far less access to the many health service and benefits provided by urban trees. The Outreach & Science program prioritizes these underserved communities in its programming. Further, in December 2018, Urban Forestry finalized its Citywide Tree Planting Strategy with an aim to grow a more equitable urban forest. Extensive outreach and community engagement was conducted to ensure that PP&R heard directly from community members living in low-canopy areas.

Community engagement strategies included focus groups, stakeholder meetings, and working with a Community Advisory Committee to ensure significant representation from people of color and immigrant, refugee, and low-income communities.

Changes to Program

In recognition of limited staff resources and to foster greater community tree stewardship, Urban Forestry Outreach and Science programs are transitioning to more volunteer-led and neighborhood-based models, and rely on partnerships with tree stakeholders, resident groups, local communities, non-profits, and volunteer participation.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	34,250
Internal Materials and Services	0	0	0	-50,108
Personnel	0	0	0	439,563
Sum:	**0**	**0**	**0**	**423,705**
FTE	0	0	0	6

Resources: The Outreach & Science program is almost entirely supported by the general fund with the exception of one FTE and seasonal staff funded by two trust funds established by Title 11: the Tree Planting & Preservation Fund (11.15.010) and the Urban Forestry Fund (11.15.020).

Expenses: Personnel costs are the majority of the expenses for this program, with additional materials and supplies to support the outreach and education aspects. The negative $50,108 in expenses is caused by a transfer that occurs in the Urban Forestry Trust Fund.

Staffing: The program has five botanists and a supervisor.

Assets and Liabilities: The program has no assets or liabilities.

Program Information

Bureau: Portland Parks & Recreation

Website: portlandparks.org

Program Contact: Jenn Cairo

Contact Phone 503-823-4405

Tree Maintenance

Program Description & Goals

The goal of the Urban Forestry Maintenance program is to perform tree work on City-owned properties and Portland public streets by planting trees and providing tree maintenance services in City parks, natural areas, and properties owned by other City bureaus.

Maintenance also ensures the safety of road users by responding 24/7 to address tree hazards and failures in Portland's public rights-of-way and on all City properties. The Tree Maintenance program is the City's sole provider of this service.
Currently, 63% of Urban Forestry hours of operations is dedicated to scheduled maintenance. This is expected to drastically decrease as the bureau's focus is directed more toward interagency work. In addition, scheduled maintenance is often interrupted during periods of bad weather (such as the winter of 2016).
Bureau performance measures tracked that are relevant to Tree Maintenance include:

-percent of operation hours dedicated to non-emergency tree maintenance requests;
-labor hours used -service to PP&R properties;
-services to other City properties; and
-emergency tree failure response.

Performance metric data for FY 2018-19 will be available in fall/winter of 2019.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of hours of Urban Forest operations dedicated to scheduled maintenance	52%	63%	63%	63%	50%

Explanation of Services

The Urban Forestry Division is guided by the Urban Forest Management Plan (UFMP) and City code, Title 11 Trees. The UFMP was developed by City staff in collaboration with a broad and diverse stakeholder group including the Urban Forestry Commission, Metro, Oregon Department of Forestry, and other community organizations.

Adopted in 2004, the UFMP established the following goals for the City's Urban Forestry program:

-protect, preserve, restore, and expand Portland's urban forest;
-promote stewardship of the urban forest; and
-provide equitable urban forest benefits for all residents of the city.

Title 11 Trees was adopted by City Council in 2015 to support implementation of the UFMP and protect the health, safety, and general welfare of residents of Portland, enhance the appearance of the City, and protect important ecological, cultural, and economic resources for the benefit of the City's residents and visitors. The Urban Forestry Maintenance program specifically advances these goals by serving as the "City's arborists" through the following services:

Tree Maintenance and Removal: By request, prunes and manages trees on PP&R and other City-owned properties to promote health, longevity, and public safety; removes dead or hazardous trees.

Emergency Response: Responds 24-hours a day to tree failures and tree hazards in all public roadways, Parks properties and other City-owned properties.

Planting and Establishment: Plants and establishes trees in Parks and natural areas to replace removed dead and hazardous trees, and for City bureaus' capital improvement projects.

Heritage Tree Maintenance: Provides limited cyclical tree care services to approximately 150 publicly-owned Heritage Trees.

Dutch Elm Disease Management: Includes monitoring, inoculation, and public outreach to limit the impacts of this fatal, contagious tree disease and rapidly removes infected elm trees within City limits.

Community Tree Stewardship Training: Trains residents, volunteers, and youth in tree maintenance through community stewardship, workforce development, and equity programs and partnerships such as the Youth Conservation Crew and Community Tree Care. Metrics measured include number of park trees removed, number of park trees planted, number of park trees pruned, and number of tree emergencies responded to.

Equity Impacts

Portland's urban forest is distributed inequitably across the city; the low-canopy areas are often also low-income and home to more people of color, immigrants, and refugees. This long-standing reality, coupled with the previously discussed reactive nature of the Urban Forestry Maintenance program, means the program's services are largely concentrated in the well-treed areas of the city.
In December 2018, Urban Forestry finalized its Citywide Tree Planting Strategy with an aim to grow a more equitable urban forest. Additional Urban Forestry services are needed to expand tree planting and maintenance in the high priority neighborhoods identified in the strategy.

Changes to Program

Preserving and adding to the City's 1.2 million park trees and 218,000 street trees is a crucial component to meeting the City's environmental goals including the 2015 Climate Action Plan. The longer, hotter, and drier summers brought about by the region's changing climate, along with the increase in extreme weather events, has placed heightened demands on the Urban Forestry Maintenance program. These changes reduce the health of the urban forest, which has negative downstream impacts on public health, air quality, wildlife habitat, water quality, heat island effects, and livability.

In the FY 2019-20 Adopted Budget, PP&R has received ongoing funding to support operations and maintenance at new park developments.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	4,062,144
Internal Materials and Services	0	0	0	583,074
Personnel	0	0	0	2,483,050
Sum:	**0**	**0**	**0**	**7,128,268**
FTE	0	0	0	18

Resources: The Urban Forestry Maintenance group is primarily funded though the City's General Fund, with additional revenue from service to other city bureaus like the Portland Bureau of Transportation. In addition, revenue comes from the Tree Planting and Preservation Fund and the Urban Forest Fund. The funds have a beginning fund balance of $3.7 million.

Expenses: Personnel costs are the primary expense for the Urban Forestry Maintenance group. The program also incurs large equipment and supply expenses. Due to the inherently dangerous nature of tree work, expenses include extensive training, equipment maintenance, and supplies to ensure staff safety.

In FY 2019-20, $300,000 is expected to be used from the Tree Planting and Preservation Fund. The fund is used to mitigate for lost canopy as a result of unmet tree preservation or planting standards, plant new trees, and provide water and maintenance care for up to five years. It is the primary funding source for implementing the City-Wide Tree Planting Strategy, which seeks to expand the urban forest to low-income/low-canopy neighborhoods which have historically lacked the benefits and services trees provide.

Staffing: In FY 2019-20, the Urban Forestry Maintenance group has the following budgeted positions: 16 arborists, a Senior Administrative Specialist, and a Supervisor. This is an increase of five FTE from previous years to meet increased responsibilities for 24/7 tree emergency response for public roads and City properties as part of a division-wide reorganization. Urban Forestry arborists are required to hold and maintain professional certifications to ensure worker and public safety and effective tree care practices, including Certified Arborist, Tree Worker Climber Specialist, State of Oregon Pesticide Applicator, Commercial Drivers Licenses, and others which require years of professional experience and demonstrated expertise.

Assets and Liabilities: The program has a large fleet of trucks and heavy equipment.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Jenn Cairo
Website:	portlandparks.org	**Contact Phone**	503-823-4405

Tree Regulation

Program Description & Goals

Title 11 Trees was adopted by City Council in 2015 to support implementation of the City's Urban Forest Management Plan (UFMP) and protect the health, safety, and general welfare of the residents of Portland; enhance the appearance of the City; and protect important ecological, cultural, and economic resources for the benefit of the City's residents and visitors.

The Urban Forestry Permitting & Regulation program is the primary entity responsible for implementing and enforcing most of Title 11. This includes all trees on City-owned properties and streets in development situations (such as construction on City-owned properties) and impacts on street trees from building on nearby property. This also includes non-development situations involving street and city trees, for example, removal, maintenance, and planting of street trees and trees on City-owned properties.

Urban Forestry is also responsible for implementing and enforcing tree regulations for all private properties when no development activity is present, for example, removal of a yard tree from a privately-owned business or residential property, with a few exceptions when overlay zones are involved. The Bureau of Development Services is responsible for implementation and enforcement of City codes related to trees on private properties in development situations.

Bureau performance measures tracked that are relevant to the Tree Regulation program include: percent of Title 11 permits not closed (calendar year), permitting FTE, permits per FTE, and permit volume.

The metric listed below reports the percentage of Title 11 permits not closed by the calendar year. This metric is an indicator of the volume of permits relative the number of staff available to process them. The goal is to have all Title 11 permits closed by the end of each calendar year. Performance metric data for 2019 will be available by February of 2020.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Title 11 permits not closed (by calendar year)	2%	5%	5%	5%	0

Explanation of Services

Urban Forestry Permitting & Regulation preserves and enhances the City's forest and trees by facilitating, implementing, and enforcing the regulatory requirements of Title 11 Trees.

Single Point of Contact (823-TREE/trees@portlandoregon.gov): Serves as Portland's "one-stop-shop" for all tree information. Receives and responds to or distributes all tree-related calls/emails sent to the city. Dispatches Urban Forestry staff to tree emergencies and provide in-person permitting assistance at the city's Development Services Center. Performs initial plan review for building permits and research inquiries and tree permitting records for the media, City Risk, Commissioner's Office and others. Reviews applications and issue certain tree permits which do not involve site visits. Receives and processes permit payments and documents and routes tree permitting activity in city databases. Represents Urban Forestry in development of certain city permitting databases, e.g., Portland Online Permitting System.

Non-Development Tree Permitting: Inspects, reviews, issues, and enforces permits for private property trees, trees in the right-of-way, and trees on City property as they pertain to Title 11; tree removal, tree pruning, tree planting, tree health inspections, tree root pruning, chemical applications, holiday lighting permits, tree attachment permits, assess and submit requested tree work for City property trees to Urban Forestry Maintenance, e.g. Parks tree work requests, inter-agency tree work requests, Bureau of Transportation safety hazard tree inspections. Presents at and represents the public interest in appeals and code hearings of certain tree permit decisions.

Development Tree Permitting: Reviews, inspects, attends meetings, and enforces development permits as they relate to Title 11 Trees including, commercial and residential building permit review, early assistance/pre-application meetings, land use review, public works permits, tree preservation inspections, right of way vacations, root pruning.

Capital Projects Tree Permitting: Reviews, inspects and attends meetings for citywide capital projects for both on-site and right of way trees from concept to completion. Includes plan review, permitting, tree preservation inspections, on-site root inspections, quality control and enforcement of permit requirements.

Title 11 Code Compliance: Reviews, inspects, and performs tree risk assessments and follow-up on all tree-related code concerns called in to Urban Forestry. Includes both development and non-development code compliance tracts including; planting compliance, illegal removals, safety hazards, administrative reviews, Code Hearings Appeals, application of monthly enforcement liens. Ensuring compliance with tree code and permit requirements is primarily reactive; reported potential violations are pursued as resources allow, however routine follow-up on permit and code requirements is seldom undertaken due to insufficient staff resources. UF studies of compliance with permit tree planting requirements - planting trees to replace those permitted for removal – show 2,000 required trees go unplanted each year, a significant concern.

Forest Management: Communicates tree benefits and urban forest management practices and provides arboricultural expertise to tree permit applicants and others including developers, property owners, property managers, City staff, residents, Heritage Tree Committee volunteers, commercial tree companies, etc.

Equity Impacts

Portland's urban forest is distributed inequitably across the city; the low-canopy areas are often also low-income and home to more people of color, immigrants and refugees. This long-standing reality, coupled with the previously discussed reactive nature of the Permitting and Regulation program, means the program's services are largely concentrated in the well-treed areas of the city. Permitting and Regulation documents and services are readily available in multiple languages, including phone translation services for callers to 823-TREE and staff access while working on-site with property owners and residents, and safe harbor languages are on all key UF tree permitting forms and public communication documents.

Changes to Program

Permitting & Regulation issues two broad types of permits: development and non-development. Development permit fees cover approximately 85% of the cost to the City to issue the permit. Non-development permit fees cover only 8% of the cost to issue and high non-development permit fees can be a barrier to tree code compliance. Consequently, development permits account for the majority of permit revenue, despite only accounting for 18% of total permit volume. This results in a disconnect between the primary revenue source (development permit fees) and the majority of workload (non-development permits).

Since Title 11 implementation in 2015, General Fund support for Permitting & Regulation has declined from nearly $900,000 in 2015 to under $500,000 currently, while being replaced with rising permit revenue. With development activity in the city beginning to decline, Urban Forestry is expecting a revenue shortfall beginning in 2019. Total permit income is expected to continue to decrease. This is resulting in reduced tree code implementation and enforcement due to increases in non-development permits and other ongoing services such as enforcing tree regulations.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	48,820
Internal Materials and Services	0	0	0	286,443
Personnel	0	0	0	1,819,159
Sum:	**0**	**0**	**0**	**2,154,422**
FTE	0	0	0	15

Resources: The Permitting & Regulations program is primarily funded through permit fees ($1.9 million) with additional revenue coming from inspection services to City bureaus ($380,000) and the general fund ($495,000).

Expenses: Personnel costs are the primary expenses for the permitting and regulation group, making up about 90% of the total budget.

Staffing: In FY 2019-20 the Permitting & Regulation program has the following budgeted positions: 13 Tree Inspectors, three Development Service Technicians II (Tree Techs), one Development Service Technician III (Tree Tech Lead), one Assistant Program Specialist, and one Supervisor. However, due to declining permit revenue, several of these positions are currently unfilled.

Assets and Liabilities:	The program's 10 vehicles for Tree Inspectors are the only assets.

Program Information

Bureau:	Portland Parks & Recreation	**Program Contact:**	Jenn Cairo
Website:	portlandparks.org	**Contact Phone**	503-823-4405

Admin & Support

Program Description & Goals

The Administration and Support Program (via the Director's Office and Deputy Director's Office of Strategy, Innovation and Performance) provides the organization with high-level leadership, strategic guidance and effective oversight of the Bureau. It leads the Bureau's workforce development and equity plan; ensures timely and appropriate response to the public, ratepayers and regulatory agencies; and functions as the primary liaison between the Bureau, City Council and other bureaus.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Bureau of Environmental Services (BES) provides critical services through its management of the City's wastewater and stormwater infrastructure and protection of public health and the environment. The Bureau is highly regulated under the Clean Water Act, Safe Drinking Water Act and Endangered Species Act and as such must ensure compliance with federal and state regulators. To facilitate regulatory compliance, BES must in turn locally regulate, monitor and enforce environmental policies. The staff that provide the oversight, accountability and coordination of this critical work is organized into two work groups, which provide the following activities:

1) Director's Office –

• Provides policy direction and executive-level strategic planning
• Coordinates the Bureau's 28 programs, within five operating groups
• Represents the City and the Bureau to the public, elected officials, other agencies and bureaus, jurisdictions, community groups and organizations
• Responds to legal issues and requests for public records

2) Office of Strategy, Innovation and Performance –

• Leads and consults on the implementation of the Strategic Plan
• Implements the Bureau's equity plan, which focuses on improving (1) outcomes for internal employees in recruitment and opportunities, and (2) service delivery for external communities of color and low-income households
• Implements the Bureau's workforce development plan, which focuses on improving training opportunities for employee growth and improving employee recognition and wellbeing
• Manages Bureau communications staff, who coordinate internal and external communication
• Coordinates improvement of the internal and external code, rules and policy development
• Supports two utility advisory groups: the Portland Utility Board and the Citizens' Utility Board
• Serves as legislative liaison with the Government Relations Office

Equity Impacts

The BES Equity Plan, adopted in 2016, provides measurable actions that BES continues to implement and track toward its goal of delivering optimally equitable services. In 2018, BES reaffirmed its commitment to equity with the BES 10-Year Strategic Plan, which incorporates a greater engagement with community-based organizations and culturally specific communities to better understand and measure the effects of BES services within these communities. As BES builds this capacity and framework, it is also developing evaluative data to support positive racial equity outcomes and equitable service levels.

The Administration and Support Program (via the Director's Office and Deputy Director's Office of Strategy, Innovation and Performance) leads the implementation of the Bureau's Equity Plan and Strategic Plan. Working with the employee Committee for Equity and Diversity, this program will assess priorities and resource needs to achieve equity outcomes throughout the year.

Changes to Program

The FY 2019-20 Budget accommodates (via technical adjustments) changes to the organizational reporting structure that occurred in FY 2018-19:

• The Office of Strategy, Innovation, and Performance was newly established within the Director's office. This team, which reports to the Deputy Director, will lead the Bureauwide innovation and continuous improvement to help the Bureau achieve the goals and outcomes in the Strategic Plan.

• The bureauwide Emergency Management Program was moved to the Bureau Support Program (within the Business Services Group).

• Development services functions (see Systems Development Program) was moved from the Engineering and Pollution Prevention groups and now reports to the Director. This change is intended to better facilitate Bureauwide coordination and efficient operation and collaboration with partner bureaus that are responsible for development and permit-related functions.

None of these changes resulted in a direct budgetary adjustment, and all changes are expected to improve efficiency, collaboration and, ultimately, program outcomes.

The budgetary changes in the Administration and Support Program are an addition of $150,000 in ongoing resources to support implementation of the Bureau's Strategic Plan, and $15,000 ongoing to support an intern (via Portland State University) to support implementation of the Bureau's equity objectives. These additions are expected to (1) specifically address the Bureau's strategic initiative to evaluate existing service delivery and decision-making systems so that those systems align with the Strategic Plan, and (2) deliver services equitably.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	256,136	202,305	267,150	420,150
Internal Materials and Services	292,337	293,778	361,141	382,602
Personnel	1,177,807	1,450,617	1,421,423	1,663,853
Sum:	**1,726,280**	**1,946,700**	**2,049,714**	**2,466,605**
FTE	7.8	9	11	

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program include personnel, regional and national association dues, and costs related to implementation of the Strategic Plan. Additionally, this program incurs interagency charges for specialized legal services, the Bureau's share of the PBOT/BES liaison staffing, and charges from the Office of Government Relations.

Staffing: 10 full-time positions support this program include the Director, Deputy Director, Coordinators (2), an Administrative Specialist III, Analysts (4), and an Environmental Policy Analyst.

Changes from FY2018-19 include a position transferred to Pollution Prevention and transfer of the Emergency Program Manager to the Bureau Support Program.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Bureau Support

Program Description & Goals

The Bureau Support Program manages the business and administrative needs of the Bureau in accordance with City administrative rules and requirements. The overarching goal of this program is to provide the administrative and support functions that (1) guide employees toward efficient, cost-effective processes and practices that encourage accountability, consistency and transparency, and (2) align with the Bureau's strategic goals.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of time loss, in hours per employee, due to injury	2.80	2.40	2.75	2.00	0

Explanation of Services

Bureau Support provides the basic services required for most administrative operations Bureauwide. Within the Business Services Group, Administrative Services provides human resources administration, facility and property management, and fleet and telecommunications coordination. Risk Services provides risk management, safety, loss prevention, emergency management, security support services, and management oversight of the Owner Controlled Insurance Programs (OCIP) for capital construction projects. Contract Management oversees contract coordination, the Bureau's Contracting Opportunities Program, and Grant Management. Management of the Wastewater Group's fleet, stores and facilities are also included in the Bureau Support Program.

The program results in coordinated decision-making regarding the following activities:

- Human resources (recruitment, hiring and HR management/administration)
- Facilities management (including security and property management responsibilities)
- Management of fleet vehicles
- Contracting that meets operating, capital, City Council and community objectives
- Risk management, employee safety and the City's Owner-Controlled Insurance Program
- The Bureau's emergency management program
- Centralized administrative coordination with partner bureaus and agencies, especially the Office of Management and Finance.

Equity Impacts

The Bureau Support Program manages the Contracting Opportunity Program, which performs extensive outreach within the Minority, Women, and Emerging Small Business (M/W/ESB) contracting community, to support and encourage contracting and subcontracting opportunities with BES. Equity considerations are also written into grant and contract agreements; those agreements have resulted in an increase of contracts awarded to minority businesses.

This program also works closely with the Bureau of Human Resources to promote and support recruitment and employee retention strategies to achieve Citywide and Bureau equity goals.

Changes to Program

The FY 2019-20 Adopted Budget accommodates moving the Bureauwide Emergency Management Program from Administration and Support (in the Director's Office) to Bureau Support (within the Business Services Group). This organizational change is expected to improve the Bureau's ability to advance priorities in the emergency preparation work plan by better integrating emergency activities Bureauwide and by improving coordination with and among other City partners. There is no budget impact resulting from this change.

Within the Business Services Group, a net increase of approximately $150,000 is to accommodate additional expenses expected to be incurred to facilitate move-in to the Portland Building. Although most costs are covered by the Portland Building Reconstruction Project, some costs – such as document management, specialty furniture/equipment considerations and relocating staff in the Pioneer Tower – will not be paid for from Portland Building Reconstruction Project resources. This expense is expected to continue in FY 2020-21.

Also within the Business Services Group, the Adopted Budget adds $100,000 ongoing to continue prior, successful efforts to use Parks Bureau ranger staff (via interagency agreements) to patrol BES-owned properties around the Springwater Corridor to prevent unauthorized camping that damages sensitive watershed areas. This service was provided via a prior interagency agreement with the Parks Bureau and was extended via one-time funding in FY 2018-19. This continuation addresses the Bureau's strategic initiative to use interbureau partnerships to deliver services in the efficient and effective ways possible.

Within the Wastewater Group, the Adopted Budget adds $150,000 in ongoing allocation to make progress in addressing a major backlog of maintenance needs at the treatment plants. Modest progress is now feasible because a new Facilities Services Manager was hired in FY 2018-19. This funding also will be used to develop a proactive maintenance plan and schedule that is expected to be more cost-effective than the prior incomplete and wholly reactive approach to maintenance.

The Adopted Budget also reflects changes to a variety of interagency agreements with other City bureaus (Risk Services, OMF-Facilities, Printing & Distribution, Technology Services) and government partners (Multnomah County Drainage District). All changes to Bureau Support Program interagency agreements in FY 2019-20 are at or below the amounts previously forecast by the Bureau.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	167,157	-2,868,127	2,613,107	538,500
External Materials and Services	2,025,663	735,853	1,891,709	2,237,144
Internal Materials and Services	5,514,616	7,212,132	7,053,736	8,102,935
Personnel	2,035,199	2,134,469	2,221,709	2,507,316
Fund Expense				
Debt Service	0	0	0	0
Sum:	**9,742,635**	**7,214,326**	**13,780,261**	**13,385,895**
FTE	18.75	17.7	21	19.7

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program include personnel, capital outlay for fleet life-cycle replacements, facility repair and maintenance costs, lease expenses, and payment of utility costs. Internal service costs include certain centralized telecommunication charges, rental costs for facilities, and payments to Risk Management for liability insurance, worker's compensation, and property insurance.

The FY 2017-18 capital outlay reflects a central accounting adjustment made after the end of the fiscal year to reverse vehicle charges and move them to FY 2018-19.

Increases to Internal Materials and Services in FY2019-20 are primarily due to increases to interagency agreements with City Fleet, Procurement Services, and Parks.

Staffing: 22 positions support this program with approximately 2.3 FTE allocated to capital projects within the Project Management and Controls Program. Positions include Supervisors (2), Analysts (4), Risk Specialists (3), Storekeepers (3), Administrative Specialists (2), Office Support Specialists (2), Coordinators (5), and a Manager I.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Communications

Program Description & Goals

The Communications Program employs a variety of communication tools and methods to promote awareness of and involvement in the work of the Bureau. The program encourages public interest and engagement with the Bureau, to promote behaviors and activities that support stewardship of the public sewer and stormwater systems. The Communications Program is strongly aligned to the strategic goal area of Community Relationships, which aims to build strong community relationships and be a trusted service provider.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of bureau education programs delivered	508	431	425	400	0

Explanation of Services

The Communications Program manages the Bureau's internal and external communications, media relations, social media, graphic design, community outreach and science education programs. The team provides services directly to BES employees, assisting them in communicating with and engaging their target audiences to achieve Bureau, City and community goals. Activities include developing and implementing strategic communications plans, messages and communications content, as well as advising on appropriate methods of distributing information to BES and City employees, City Council and community audiences.

Frequent and open communication with the public has many benefits:

- Increased transparency about how BES uses ratepayer funding to build and maintain sewer and stormwater infrastructure and protect public health and the environment
- Increased public awareness of issues facing the Bureau and the sewer and stormwater system
- Better relationships and partnerships with the public
- More awareness of how the public can work with BES to protect sewer infrastructure and the environment (such as not dumping grease down the drain, reducing pesticide use on lawns, and reporting illegal dumping, pollution and spills)
- Increased support for Bureau efforts
- Provision of information about Bureau projects and programs directly to the public, so that people do not have to rely solely on the media and social media to learn about Bureau activities

Equity Impacts

The Communications Program works directly with Portland's communities of color and people with disabilities to ensure and improve access to BES services.

Changes to Program

Changes in the media landscape, community expectations regarding access to information and potential changes in regulatory requirements necessitate ongoing review of communications strategies and tactics. In addition, implementing the Strategic Plan has required a significant increase in the amount and importance of internal communications.

Portland's demographics are changing, and consequently the Bureau's engagement and outreach efforts need to be responsive to the needs of a wide range of communities. This has resulted in a significant increase in the need for enhanced cultural responsiveness, language resources and culturally specific outreach and engagement.

There are no major discretionary budgetary changes to the Communications Program in the FY 2019-20 Adopted Budget.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	35,000	0
External Materials and Services	104,128	160,043	373,571	373,571
Internal Materials and Services	60,945	78,932	80,530	34,745
Personnel	876,769	1,054,441	993,470	1,018,081
Sum:	**1,041,842**	**1,293,416**	**1,482,571**	**1,426,397**
FTE	6	8.1	12.6	7.55

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Expenses for this program include personnel and funding for public service, awareness and outreach campaigns. Internal service costs are primarily attributable to printing and distribution of materials.

Staffing: 13 positions support this program with approximately 5.45 FTE allocated to capital projects within the Project Management and Controls Program Area for public outreach on construction projects. Positions include a Public Information Manager and Officer, Coordinators (10), and a Graphic Designer.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Employee Development

Program Description & Goals

The Employee Development Program is aligned with the strategic goal area of Workforce Development, which involves developing, retaining and attracting highly skilled, diverse and knowledgeable employees that can meet the challenges ahead. This program identifies and coordinates training needs and solutions for managers and employees, manages the employee recognition program and ensures that employees complete required trainings. The Wastewater Group's Learning and Development work unit is also budgeted within the Employee Development Program.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Bureau's Strategic Plan identifies Workforce Development as one of six key goal areas. To achieve its strategic outcomes, the Bureau needs a highly engaged and committed workforce. Nearly one-quarter of the Bureau's workforce will be eligible to retire over the next five years. In addition, new ways of working require that employees be trained in current processes, best practices and technology. Cross training and information sharing, as well as training the new generation of workers, are critical to ensuring the Bureau's long-term success.

Another critical goal is ensuring the safety of our employees and the public. The Employee Development Program works closely with the Bureau's Risk Services Division to develop and update the Bureau's list of required safety trainings. Trainings that are offered to employees are tracked and reported quarterly.

The Bureau's Strategic Plan has identified professional development and cross-training opportunities as strategic initiatives. The Employee Development Program aims to research key training needs for each job classification and identify appropriate training opportunities.

The Wastewater Group's Learning & Development work unit completes assessment and ongoing management of training needs for Wastewater Group staff and related functions. It also provides support for succession planning and employee transition through knowledge capture, skill development and program/work unit orientations, and supports advancement of workforce initiatives that can encourage workforce diversity and career advancement such as trainees, apprentices and interns.

BES has a successful onboarding program (implemented in FY 2017-18) and employee recognition program that help employees understand the Bureau's varied, interconnected areas of work and how employees' work supports our mission. The Bureau's PEER program improves BES culture and empowers employees to address workplace and personal challenges.

Equity Impacts

This program monitors and reports on the BES Equity Plan's participation goal that all employees complete 8 hours of racial equity and workplace diversity training annually, to build their skills and understanding of these issues.

In addition, bureauwide efforts are underway to develop improved organizational initiatives and employee development tools to advance career opportunities and encourage a diverse workforce.

Changes to Program

There are no budgetary additions to the Employee Development Program in FY 2019-20. However, this year's budget folds the Wastewater Group Learning and Development unit into the Employee Development Program (from the Wastewater Services Program).

Future increases are to the Employee Development Program are possible, given that the Bureau's Strategic Plan emphasizes workforce development as one of the six primary goal areas, with strategic initiatives that include expanding options for and implementing professional development and cross-training opportunities. Additionally, the City's Bureau of Human Resources (BHR) recently implemented a new training application for employees that has increased the Bureau's responsibilities to enter and track data within the system. The Employee Development Program will be working closely with BHR to (1) ensure that BES managers and employees know what trainings are required and whether they have been completed, and (2) provide training on how to use the new system.

Currently, some activities related to employee development are dispersed throughout various individual program budgets. The Bureau anticipates this to be reconsidered in future year budget requests.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	19,361	95,280	37,220	37,220
Internal Materials and Services	0	273	0	70,210
Personnel	718,240	718,722	0	116,357
Sum:	**737,601**	**814,275**	**37,220**	**223,787**
FTE	0	0	0	1

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Expenses for this program include personnel, payment of professional licenses and an internal transfer to the Bureau of Human Resources for the Bureau's share of a professional development fund for the PTE-17 and DCTU unions.

Staffing: 1 Management Analyst supports this program and has been allocated from the Wastewater Services Program.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Finance

Program Description & Goals

The Finance Program includes budget development, accounting, financial forecasting, debt management, rate and fee development, project tracking, year-end financial reporting, wholesale service contract administration, management of the Clean River Rewards stormwater discount program and support for the Nonconforming Sewer program (managed by the Systems Development Program). The Finance program budget also includes required Utility License Fee payments. The Finance Program monitors, manages and administers more than $950 million in transfers for the payment of legally required debt service, transfers to and from the Rate Stabilization Fund, transfers to and from the Construction Fund and fund contingency.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Maintain the bureaus first lien debt service coverage ratio at 1.5 or greater	2.51	2.63	2.68	2.85	0
Maintain bureaus combined first and second lien debt service coverage ratio at 1.3 or greater	1.43	1.51	1.30	1.40	0
Average single family household bill as a percent of median income	1.00%	1.43%	1.42%	1.42%	0

Explanation of Services

The Finance Program (within the Business Services Group) consists of multiple centralized services and functions. The three primary components are Financial Planning, Revenue Programs and Accounting.

The Financial Planning Division manages tools and processes to ensure that resources are available to fund the core mission of BES. There are three key functions within Financial Planning. First, working with groups throughout the Bureau, Financial Planning is responsible for coordinating, assembling, monitoring, and adjusting the annual budget; this includes coordinating with other bureaus Citywide and communicating with the Portland Utility Board, Citizens' Utility Board and other public interests. The second function of the Financial Planning Division is to manage the system forecast to project revenue and spending over a long-term horizon, to ensure that current financial plans are sustainable and that the Bureau remains financially stable. The division's third key responsibility is annual development of rates and fees that allow the Bureau to recover certain costs and ensure that sufficient resources are available to meet operational and capital needs. In addition to the three key functions, Financial Planning provides financial policy analysis and recommendations, monitors cash flow, ensures payment of outstanding debt, provides legally required disclosure information for bonds, manages wholesale service contracts and performs ad hoc financial analysis as necessary.

The Revenue Programs Division provides technical and financial assistance related to the provision of stormwater and sewer services to internal customers (namely the Water Bureau, non-conforming sewer program, Capital Improvement Program [CIP] and City Auditor's Office) and external customers (e.g., ratepayers, property owners and neighboring sewer districts). The primary mission is to collect fees for service, to approve credits and loans and to accomodate conforming public sewer connections in a fair and equitable manner (e.g., correct billing errors, incentivize private stormwater management and remedy failed septic and nonconforming sewer connections). The Revenue Programs Division manages six distinct City-wide programs: Clean River Rewards (i.e., the stormwater discount program), GreenBucks (a green infrastructure maintenance program), stormwater measure/re-measure program, storm sewer urban services, required sewer connection and sewer loan programs. Additionally, this team is responsible for identifying and communicating to the Water Bureau all starts, stops and corrections to storm sewer provisions on utility bills. The Revenue Programs Division also conducts Administrative Reviews and facilitates hearings in response to customer appeals.

The BES Accounting Services Division provides for all the accounting needs of the Bureau. Major functions include maintaining the Bureau's financial structure, capital project and fixed assets accounting, grants accounting, revenue and accounts receivable, accounts payable and preparing BES audit assignments for the City's audited Comprehensive Annual Financial Report. The division is also responsible for payroll and time management for the Bureau and timekeeping for employees.

Equity Impacts

The Finance Program manages the Bureau's financial assistance programs, including low-interest, deferred loans to qualifying low-income homeowners for mandatory and nonconforming sewer connections. BES works with financially impacted communities to minimize any hardships or dislocations caused by sewer connection requirements.

Changes to Program

The primary budgetary change in the Finance Program for FY 2019-20 is an addition of $250,000 in funding to continue work on a comprehensive rate study. The prior comprehensive rate study was completed nearly 20 years ago; since then, community demographics, Bureau priorities and rate methodology best practices have changed. The Bureau (via the Financial Planning Division) will be hiring an outside consultant to conduct the comprehensive rate study. A Request for Proposals process is currently underway, with an expectation that the consultant's work can begin in FY 2018-19. The study is expected to take place in three phases, with the bulk of the work being completed in FY 2019-20. Once due diligence is completed and consultant recommendations are developed, the final phase (anticipated in FY 2020-21) will include public discussions prior to implementation of a potentially updated rate structure for FY 2021-22. This budget request supports multiple strategic initiatives, including reforming the budget and financial process, delivering services equitably and engaging proactively with community stakeholders.

The FY 2019-20 Adopted Budget also increases the Bureau's ongoing cost for purchases of Renewal Energy Credits by $50,000, as a result of updated usage/cost calculations provided by the Bureau of Planning and Sustainability to comply with City Council Resolution No. 36983 and the 2015 Climate Action Plan. This request supports the Bureau's strategic initiative to integrate City goals into our culture, operations and decision-making.

There are no discretionary budget changes in FY 2019-20 for the Revenue Programs Division or Accounting Division.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	29,223	0	35,600,000
External Materials and Services	18,001,090	18,737,122	20,222,131	21,355,531
Internal Materials and Services	3,735,592	3,727,741	3,809,483	5,472,793
Personnel	2,127,841	2,099,256	2,314,820	3,485,642
Fund Expense				
Contingency	0	0	354,304,496	497,169,890
Debt Service	547,224,345	174,456,885	186,409,135	186,750,305
Debt Service Reserves	0	0	62,230,325	71,433,409
Fund Transfers - Expense	349,808,499	358,545,264	390,284,621	401,830,913
Ending Fund Balance	280,331,591	499,076,761	0	0
Sum:	**1,201,228,958**	**1,056,672,253**	**1,019,575,011**	**1,223,098,483**
FTE	17	17	17	18

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Expenses for this program include:
• Financial Planning, Accounting, and Revenue division personnel
• One-time capital outlay for the acquisition of 2 floors of the Portland Building
• The utility license fee (recorded in External Materials and Services)
• Bureau contingency
• Debt service and related costs on new and outstanding bonds
• Utility charges for wholesale contracts
• Low income discount payments to Home Forward.
• Funding for the Community Opportunity and Enhancements Program.
• Fund level transfers to and from Rate Stabilization, Construction, and Debt Service funds
• Inter-agency services for the payment of the Bureau's share of water meter costs and General Fund Overhead.

Fund Expenses:
• Actual Contingency amounts for FY 2016-17 and FY 2017-18 are not presented as they are an estimated figure. Actual fund balances can be found in the City's Comprehensive Annual Financial Report.
• The estimated increase in Contingency for FY 2019-20 is primarily from unspent proceeds from a planned FY 2019-20 bonds sale.
• FY 2016-17 debt service amounts reflect payments to refund outstanding bonds.

Staffing: 18 positions support this program. Positions include the Business Services Group Manager, Financial Analysts (5), Accountants (5), Administrative Specialists (3), Coordinators (3), and a Supervisor II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Information Management

Program Description & Goals

The Information Management Program comprises the Mapping, Data and Application Services (MDAS) Division within the Business Services Group and the Work and Asset Management System (WAMS) used by the Wastewater Group.

The Information Management Program provides high-level, 24/7/365 technical support and consulting for the Bureau's information and technology solutions, including mapping, data, IT-related project management and comprehensive asset management software applications.

This program actively supports the Bureau's strategic initiative to optimize IT and data management systems to prioritize responsive governance, information access and data security.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

MDAS provides IT/data-related, business process review, consulting, project management, application development/maintenance and database services for the Bureau and a variety of Bureau-specific applications. The MDAS Division Manager works with the BES management team and subject matter experts to identify business needs, IT requirements and data management strategies; this person also liaises with the Bureau of Technology Services (BTS) and peers in other City Bureaus to plan for solutions and services related to the ongoing operations and improvements of the Bureau's technology infrastructure.

Although the focus of the Information Management Program is primarily to run and maintain the Bureau's current IT systems, typically MDAS staff also evaluate and manage innovation(s) and proposed IT/data-related initiatives in collaboration with the requesting group and prioritize initiatives in accordance with BES' Strategic Plan and Bureau leadership.

The MDAS Mapping unit creates and maintains asset-specific information related to BES' Sanitary and Stormwater Collection System, which includes the mapping and attributing collection system assets and creating or chronicling As-Builts and other pertinent records. MDAS also helps to create and/or administer several other BES-related geographical information system (GIS) layers, which are both authoritative (i.e., distributed via the corporate GIS hub) or non-authoritative (i.e., work products in various stages of completeness).

The Wastewater Group uses a Work and Asset Management System (WAMS) daily by to manage the work and assets at two treatment plants and 98 pump stations. This includes maintaining an asset register with detailed attribution; defining, scheduling and triggering preventive, predictive, corrective and emergency maintenance work; recording labor hours; recording work accomplishments; tracking work history; managing parts inventory; procuring materials and services; and providing asset lifecycle costs, analysis and reporting capabilities.

Equity Impacts

The Information Management Program aims to deliver services equitably Citywide, in alignment with the BES Strategic Plan.

Changes to Program

In FY 2018-19, the MDAS Division hired for a newly created Data Strategist position to develop and manage a strategy to efficiently collect and use Bureauwide data. This multi-year effort will direct future Information Management priorities and budgetary decisions. Other initiatives in FY 2018-19 to improve Information Management decision-making and performance include formation of an IT Governance Committee (including representation from all work groups) and the introduction of new project management tools (e.g. Trello and SmartSheets).

General Fund decisions that impact the Bureau of Technology Services (BTS) inevitably affect the amount of Bureau-level effort and/or resources required of the Information Management Program. Although no major resource increases are submitted in this FY 2019-20 Adopted Budget, reductions (or limited increases) to BTS resources negatively impact the ability of the BES Information Management Program to meet service expectations.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	78,523	102,073	35,000	587,980
External Materials and Services	452,210	640,279	1,616,228	1,037,325
Internal Materials and Services	3,187,379	3,090,196	3,210,820	3,537,574
Personnel	2,301,801	2,384,767	2,221,919	1,985,035
Sum:	**6,019,913**	**6,217,315**	**7,083,967**	**7,147,914**
FTE	16.8	17.25	19	14.85

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Expenses for this program include personnel, data processing services for Heron and Hansen software packages, computer supplies and equipment, and various software licenses. Additionally, this program supports interagency agreements with the Bureau of Technology Services for bureau-wide life-cycle computer replacements, desktop support, and GIS applications.

The increase in Capital Outlay reflects the acquisition of the Environmental Compliance Information Management System. The project was budgeted as External Materials and Services in FY 2018-19 but was delayed to FY 2019-20.

Staffing: 17 positions support this program with 2.15 FTE allocated to capital projects within the Project Management and Controls Program. Positions include the Division Manager, a Mapping and GIS Supervisor, GIS and CAD Technicians (9), and Business Systems Analysts (6).

Two positions are transferred in FY2019-20 to the Bureau of Technology Services and will be paid for via interagency agreement (Internal Materials and Services).

Assets and Liabilities:	This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Engineering

Program Description & Goals

The Engineering Program is led by the Chief Engineer, the official agent of the Bureau who is responsible for public improvements. The Chief Engineer is responsible for establishing, maintaining and enforcing the technical standards for design and construction of public works projects necessary to maintain public health and the health of the environment. The Engineering Program also integrates the organizational management, human resources, budget and administrative support functions of the Engineering Services Group to ensure the smooth operation of the work group, which has just over 200 full-time employees or other staff distributed across four work locations. Project decisions, leadership and organizational work of the Chief Engineer across the five program areas within the Engineering Services Group impact the quality and output of projects to meet system needs, regulatory requirements and other drivers. This impacts many of the Bureau's performance measures, especially those related to the planning, design and construction of pipe, facility and natural assets.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Construction management costs as a percentage of total construction costs	9%	14%	10%	12%	0
Feet of streambank restored (not cumulative)	20,274	22,311	12,000	12,000	0
Number of sanitary sewer overflows	180	168	131	135	0
Number of combined sewer overflow events	7	3	4	4	0
Linear feet of sanitary and combined sewer pipe repaired or replaced to improve condition and capacity	109,745	93,006	145,000	57,000	0

Explanation of Services

The Engineering Program comprises the leadership, administration and operations functions for the Engineering Services Group. The program includes the office of the Chief Engineer and related group-wide support functions. The Chief Engineer is the signatory for all Bureau-related public works construction documents and provides management and leadership for the Engineering Services Group. This group consists of five programs that serve ratepayers and the community by managing the planning, design and construction of sewer and stormwater projects to protect public health and watersheds. Collectively, the Engineering Program and the five programs under the Chief Engineer (Asset Systems Management, Capital Program Management and Controls, Design Services, Construction Services, and Materials Testing Lab) provide the analysis, engineering design, construction management, technical standards and best management practices, and Capital Improvement Program (CIP) implementation and budget management to produce projects that improve, protect and enhance the Bureau's infrastructure.

Equity Impacts

The Engineering Program leads and directs the Engineering Services Group's implementation of the BES Equity Plan and BES Strategic Plan initiatives to ensure positive racial equity outcomes on all Engineering activities and projects.

Changes to Program

Increased challenges in employee movement, training/onboarding and turnover as a result of retirements and a highly competitive job market have increased the administrative, management and leadership workload of the Engineering Program. The operating environment also has changed significantly in the last year as a result of the prioritization of Bureau efforts, including CIP delivery increases, CIP process improvements, reorganization discussions and building moves/ facility needs (which have affected the entire Engineering Services Group).

In FY 2018-19, the Systems Development Program (formerly within the Engineering Services Group) was restructured to report directly to the BES Director's Office. Additional changes to organizational structure are being considered to improve efficiency, oversight of work and customer service. Engineering operations and administration are undergoing systematic process improvements to increase efficiency. Staff are using technology in a much more significant way to improve productivity, communication and records management. The Chief Engineer has led the Engineering Services Organizational Development Project to improve collaboration, increase productivity and reduce turnover. The Program is implementing policy and practice updates related to teleworking, flexible schedules and other workplace culture improvements to attract and retain a highly talented workforce.

Other than adjustments to accommodate standard life-cycle vehicle replacement schedules, there has been no reallocation of resources to or from this program in recent years, and no major operational budget changes are required for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	62,007	28,461	674,059	617,500
External Materials and Services	84,349	168,613	109,622	83,089
Internal Materials and Services	169,568	178,966	333,989	45,400
Personnel	857,497	965,485	1,022,138	1,112,445
Sum:	**1,173,421**	**1,341,526**	**2,139,808**	**1,858,434**
FTE	8	9	9	9

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Expenses for this program include personnel, Capital Outlay for life-cycle vehicle replacement, training opportunities for Engineering staff, and specialty computer equipment. Additionally, this program supports interagency agreements with the Bureau of Transportation for Keep Portland Moving and survey markers used by the Bureau.

Staffing: 9 positions support this program. Positions include the Chief Engineer, an Analyst, Records Specialist, Administrative Specialists (3), and Office Support Specialists (3).

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Asset Systems Management

Program Description & Goals

The Asset Systems Management (ASM) Program (within the Engineering Services Group) identifies and appropriately prioritizes BES asset system improvements and investment strategies needed to continue to maintain and improve the service levels and reliability of wastewater and stormwater system infrastructure, including balancing the need to meet regulatory requirements. The ASM Program identifies, clarifies and communicates the levels of service related to physical system assets and the related decision-making processes that are needed to put those assets into service for customers. This program directly impacts the performance measures listed below by providing the system planning and analysis (i.e., hydraulic and hydrologic modeling) that informs and prioritizes system investments to reduce the risk of sewer pipe failure, capacity-related flooding and combined and sanitary sewer overflows. The project-level modeling and analysis that the ASM Program provides also directly impacts performance measures by informing appropriate project design.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of sanitary sewer overflows	180	168	131	135	0
Number of stormwater flooding events due to system capacity	111	60	100	100	0
Number of combined sewer overflow events	7	3	4	4	0
Linear feet of sanitary and combined sewer pipe repaired or replaced to improve condition and capacity	109,745	93,006	145,000	57,000	0

Explanation of Services

The Asset Systems Management Program provides analysis, interpretation and in-depth, functional understanding of how BES system assets interact with each other. This is done at all evaluation scales, from citywide down to the local project level. This function is necessary to identify and prioritize BES system improvements and asset investment strategies, to (1) maintain and improve the service and reliability of the City's wastewater and stormwater infrastructure as cost-effectively as possible, and (2) protect public health and safety systemwide. ASM is the only program in the Bureau that performs this essential function. ASM is sometimes requested to support and assist other work groups by collaborating on new system-related initiatives or through technical review of work. This work depends on institutional knowledge and leveraging an intimate understanding by ASM staff of how the BES asset systems function. Developing these skills is an investment in time and mentorship of staff. This knowledge is gained through experience and work performed over years by ASM staff on highly technical, multi-faceted wastewater and stormwater infrastructure system and process analyses.

Equity Impacts

The ASM Program is responsible for incorporating equity considerations into the risk evaluation and project prioritization processes for the combined and sanitary sewer system assets. The current risk process uses U.S. Census information on vulnerable communities. The ASM Program is working with other Bureau work groups to expand how we incorporate equity into the broader system planning space, such as by establishing targets for levels of service.

Changes to Program

The demand for ASM resources has doubled since FY 2015-16, specifically in the areas of spatial analysis and modeling analysis, alongside major system planning efforts initiated over the past two fiscal years. As the limited-term consultant services to support the strategic planning efforts come to an end by FY 2020-21, the expectations and demand on internal staff resources will increase. Although limited-term contracts have helped initiate the strategic planning efforts, the internal staffing resources necessary to implement and sustain the improvements have not advanced. The increased workload burden on staff has demonstrably resulted in increased overtime and observed instances of sick time.

ASM looks to increase by one Engineering FTE in FY 2019-20 to support the modeling team, with more budget requests in the future to accommodate the increased demand. Where feasible, ASM has been using contracted resources to meet this workload. Contract staff are best used to level peak workload and perform one-off analyses or simple requests that would otherwise disrupt ASM staff workflow on more complex system analyses. Contract staff are also used to help initiate new project initiatives on a limited contract term (e.g., Resiliency Master Plan). Historically, contracting more of the strategic planning and complex system analysis work resulted in reduced product quality at a higher cost to the City. Additionally, the knowledge gained through the work does not stay in the City (i.e., contract turnover is typically higher than turnover among permanent City staff [FTE)]). Adding in-house FTEs will create more productive and cost-effective outputs over the long-term and allow the City to retain the knowledge invested in FTEs. This is critical if the ASM Program is to perform its essential functions.

The FY 2019-20 Adopted Budget decreases the allocation for spending on the multi-year Continuous Collection System Plan update as result of delays in contracting that occurred in FY 2018-19. The total cost of the multi-year project (anticipated for completion in FY 2020-21) remains unchanged at $1.5 million.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	1,964,102	2,533,092	0	0
External Materials and Services	2,610,883	704,726	960,692	645,445
Internal Materials and Services	-9,615,171	-9,858,904	210,771	261,635
Personnel	1,998,802	1,601,754	1,942,190	2,194,680
Sum:	**-3,041,384**	**-5,019,331**	**3,113,653**	**3,101,760**
FTE	18.25	12.05	24	13.5

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program are personnel, outside consultant costs for system plans (Resiliency, Pump Station, and Continuous Collection Master Plans), and specialty engineering software. Additionally, this program supports costs of laboratory services and field operations for sampling and monitoring from the Water Pollution Control Lab.

Actual Internal Materials and Services for FY 2016-17 and FY 2017-18 reflect an accounting entry that reduces operating expenses and allocates the expenses to capital projects representing the bureau overhead allocations.

Staffing: 25 positions support this program with approximately 11.5 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include Engineers (23) and GIS Technicians (2).

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Construction Services

Program Description & Goals

The Construction Services Program (within the Engineering Services Group) provides construction management and inspection services for BES capital projects, development projects and projects managed by other City bureaus for assets that become part of BES's infrastructure. The Construction Services Program ensures the construction of safe, high-quality and cost-effective projects that aim for completion on schedule and within budget, with minimum disruption to the public. This program directly impacts construction management costs as part of overall project costs and works to maintain those costs at or below the industry standard. The program's focus on job site safety impacts the Bureau's overall incident rate. Construction management for capital projects to improve Bureau assets such as sewer pipe repair and replacement, treatment facilities and stream restoration is responsible for delivery of those projects on schedule, which impacts all measures related to capital project output (including combined sewer and sanitary sewer overflows).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of time loss, in hours per employee, due to injury	2.80	2.40	2.75	2.00	0
Construction management costs as a percentage of total construction costs	9%	14%	10%	12%	0
Feet of streambank restored (not cumulative)	20,274	22,311	12,000	12,000	0
Linear feet of sanitary and combined sewer pipe repaired or replaced to improve condition and capacity	109,745	93,006	145,000	57,000	0

Explanation of Services

The Construction Services Program oversees installation of capital infrastructure, such as pipes and stormwater facilities, to ensure that they are installed properly and safely. The Bureau owns and maintains most constructed assets, so quality control during installation helps maximize asset life. The program has a comprehensive focus on safety for the protection of the public, City staff and the contractor's workers and to reduce injury or disability claims. The Construction Services Program is responsible for making progress payments to contractors, negotiating compensation for additional scopes of work added to existing contracts and helping to resolve any disagreements that ensue between the City and contractor.

Key activities include the following:

- Supporting development and management of project scopes, schedules and budgets
- Reviewing and determining the constructability of all projects during design
- Developing and executing project construction work plans
- Managing and documenting project decisions, meetings and changes
- Inspecting construction projects for safety and quality compliance
- Making construction contract progress payments to contractors
- Managing projects in accordance with BES's CIP Implementation Manual, Quality Control Manual and project management/document control software and process
- Preparing Council documents as needed for construction-related procurement processes, agreements, contracts and right-of-way acquisition and permits

In addition, Construction Services contributes cost estimating and budgeting functions via CIP development input, historical bid analysis, construction staff input, budget preparation and monitoring of economic conditions in the construction industry.

Equity Impacts

As part of its management of construction contracts, the Construction Services Program ensures that contractors comply with minority subcontracting requirements, including participation from Minority, Women, and Emerging Small Business (M/W/ESB) and other City equity-driven contracting opportunities.

Changes to Program

The program's focus and workload follow the overall CIP, with an increased focus on pipe rehabilitation projects and treatment plant and pump station facility projects. There has been an overall increase in project workload with the ramp-up of the CIP. In recent years, the combination of increased traffic and more street infrastructure that requires maintenance and upkeep has constrained construction activities, adding to the complexity of construction projects and the time needed to complete them.

With the relatively healthy economy, it has been difficult in recent years to retain qualified construction program staff. Staff turnover in the Construction Services Program has been high as staff seek the promotional opportunities and higher pay available in the private sector. Although the program has had modest FTE increases in recent years, it still relies on temporary contract staff to lead and complete many projects. However, contract staff training requirements, frequent turnover of contract staff and the lack of retained in-house knowledge and experience all hamper efficient project delivery.

BES recently started using an improved software solution (Heron) for capital project management that is eliminating paper-based redundancy and inefficiencies in the Construction Program. Also, outfitting construction inspectors with iPads has helped them use their time more efficiently in the field. The new management team is actively and more consistently monitoring performance and developing training and support resources to ensure that all staff can work as efficiently and effectively as possible.

Despite the staffing challenges and increases in delivery expectations described above, no major discretionary budget adjustments are required in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	4,774	0	0	0
External Materials and Services	96,348	115,761	150,165	133,376
Internal Materials and Services	127,865	180,598	64,480	42,629
Personnel	1,656,713	1,914,095	1,778,562	2,148,060
Sum:	**1,885,700**	**2,210,454**	**1,993,207**	**2,324,065**
FTE	7.55	14.3	57.1	14.6

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program are personnel. Supporting items include costs for protective equipment, uniforms, licenses, training, and parking permits for Inspector vehicles.

Staffing: 57 positions support this program with approximately 40.85 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects and 1.55 FTE allocated to the Systems Development Program. Positions include Engineers (25), Capital Project Managers (3), Public Works Inspectors (27), a Manager I, and a Supervisor I.

Assets and Liabilities:	This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Design Services

Program Description & Goals

The Design Services Program (within the Engineering Services Group) provides project management and engineering design services for capital projects. The program includes two divisions: the Design Services Division and the Treatment and Pumping Systems Engineering Division. The goal of the Design Services Program is to plan and deliver projects that (1) improve the reliability and capacity of the Bureau's treatment infrastructure and wastewater and stormwater conveyance system, and (2) protect and improve water quality and watershed health. Projects are identified through planning efforts Bureauwide, based on risk, condition and the consequence of failure for existing assets and on new requirements, such as regulatory or capacity needs. The Design Services Program impacts every Bureau performance measure related to capital project delivery and output. Most directly, project management and engineering for planned capital projects to address pipe repair and replacement and stream restoration impacts the output "units" of those measures annually. Design and delivery of projects related to treatment plant assets impacts the cost of operations and maintenance (O&M) of those assets, and the design and delivery of nearly all BES projects impacts water quality measures and other measures, such as occurrences of combined and sanitary sewer overflows.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of wastewater processed annually (in million gallons)	36,242	28,901	29,400	29,400	0
Feet of streambank restored (not cumulative)	20,274	22,311	12,000	12,000	0
Watershed Health Index for water quality	5.90	5.50	5.90	5.90	0
Linear feet of sanitary and combined sewer pipe repaired or replaced to improve condition and capacity	109,745	93,006	145,000	57,000	0

Explanation of Services

The Design Services Program provides project management and engineering design services for capital projects ranging from the Bureau's wastewater conveyance (i.e., pipe) and treatment infrastructure to stormwater facilities and stream restoration. Activities include the following:

- Leading project scoping and work plans and managing projects through the design phase
- Completing designs in accordance with professional and BES standards
- Completing engineering calculations
- Meeting City and regulatory requirements (including technical analyses)
- Requesting, coordinating, securing and incorporating information gathered and provided by internal and external stakeholders and service providers
- Preparing and professionally sealing contract documents, including technical specifications and design plans and details

The Design Services Program encompasses the Treatment & Pumping Systems Engineering Division, which manages planning efforts for the wastewater treatment plants, manages the construction phase of project delivery, and provides technical engineering support for plant O&M staff.

Equity Impacts

The Design Services Program delivers projects that benefit human health and safety and the environment. Infrastructure investments are identified through planning efforts based on risk, condition and the consequence of failure for existing assets and on new requirements such as regulatory or capacity needs. An equity lens is applied to all projects to inform Bureau infrastructure decisions. This primarily occurs during system planning (Asset Systems Management Program) and the project prioritization process (Capital Program Management and Controls Program), but also occurs during project work planning and design.

Changes to Program

Despite process improvements currently underway, demand for work from the Design Services Program far exceeds available resources, as the Bureau aims to improve and increase collaborative project planning and delivery outcomes to ensure sustainable long-term capital investment. The number of identified capital projects requiring assignment of Design Services staff continues to grow, leading to project delay.

This program added four FTEs in the FY 2018-19 Adopted Budget in response to a need to improve Design Services delivery. However, constraints on further FTE additions, staff retirements and turnover have kept the anticipated program improvements from fully materializing. Staff are relying on consultant expertise for program delivery support when feasible and are using on-call contracts to be more responsive and timely in constructing design solutions. The Design Services Program also relies on temporary contracted staff, which is not optimally desirable. When appropriate, the Design Services Program is expanding its use of alternative project delivery methods (in lieu of the standard design-bid build process) to meet program goals. These adjusted solutions often require increased upfront effort and communication but are expected to shorten overall project delivery schedules.

Recently, the Design Services Wastewater Engineering Section became a new division called the Treatment & Pumping Systems Division (TPSD). The new division is included in the Design Services Program budget and includes staff from both Design Services and Construction Services that work on wastewater treatment plant, pump station and force main assets.

The Design Services Program includes three additional FTEs in FY 2019-20, as part of a multi-year need to increase staffing to deliver planned CIP projects:

• Structural Engineer within TPSD. BES does not have a structural engineer on staff, despite owning significant treatment and pumping facilities, and there has been an ongoing need for structural support for projects in the Repair, Rehabilitation & Modification (RR&M) and Pump Station Improvement programs. Historically, this need has been met with minimal success using on-call professional technical expert (PTE) contracts. However, these contracts have resulted in inconsistent service outcomes and significant project delays. Although increasing the existing on-call contract remains an alternative, it is an expensive option (current billing rates are $135 to $200/hour), and this remains an ongoing, long-term need. An in-house staff person is expected to maximize efficiency; this person will specialize in Bureau assets, processes and outcomes, thereby improving structural assessments and project delivery.

• Automation & Controls Engineer within TPSD. There is a current and ongoing need for project and O&M support related to controls and automation at the Columbia Boulevard and Tryon Creek wastewater treatment plants, and for the Bureau's 98 pump stations. This Engineering Associate will fill the long-term need via specialized management of the Automation and Control Narrative update and implementation process for capital projects, which includes coordinating with Wastewater Group operations staff and other engineering staff to develop revised control strategies and prepare documentation for approval and implementation. This need is currently being filled by contract staff, at approximately the same annual cost, but with the added risks and inefficiencies of high turnover, training needs and contract term limitations.

• Collection System Design Engineer within the High-Risk Rehab Program. This position will support delivery of projects in the Bureau's pipe rehabilitation program, including the Large Diameter Program and Downtown/Old Town Rehab projects, which have been identified as near-term priorities because of the high risk of failure within 5 years. This program encompasses more than $250 million in capital projects over the next 10 years, with more than $25 million in high-priority projects currently unassigned over the next 3 years because of limitations in staff resources.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	349,817	87,529	186,789	143,059
Internal Materials and Services	40,563	33,987	22,269	21,778
Personnel	2,049,938	1,948,577	2,158,648	2,703,954
Sum:	**2,440,318**	**2,070,093**	**2,367,706**	**2,868,791**
FTE	7	8.7	51	15.95

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program are personnel and consultant charges for the Pump Station Design Manual. Supporting items include costs for training and training materials, specialty computer supplies and software, dues for member organizations, and continuing education.

Staffing: 54 Engineering positions support this program with approximately 38.05 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Materials Testing Lab

Program Description & Goals

The Materials Testing Lab (MTL) Program provides quality assurance (QA) and quality control (QC) of materials used in the construction of Bureau assets. QA/QC involves materials testing, code-mandated special inspection, confined space entry, and geotechnical services and evaluation of emerging technologies and products. In addition to providing these services for BES projects, the lab also provides services to other City bureaus (primarily the Water Bureau, Bureau of Transportation and Parks Bureau), typically on a fee-for-service basis. The MTL Program most directly impacts the performance measure for pipe repair and replacement, because of the MTL's role in testing and evaluating materials in the design and construction of those capital projects.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Linear feet of sanitary and combined sewer pipe repaired or replaced to improve condition and capacity	109,745	93,006	145,000	57,000	0

Explanation of Services

The MTL Program provides industry-standard testing and evaluation services for construction materials, to ensure that materials used in BES capital projects and other City bureau projects meet national and international standards. The program monitors the quality of pipe materials, asphalt mixes, concrete mixes and precast concrete products to ensure that City projects are using appropriate products in the construction of long-term public assets. For example, monitoring ensures that the type of pipe used in a sewer rehabilitation program is appropriate and durable for local conditions. This testing and monitoring is performed "real-time" in the field, for samples of actual products at the time of installation. The MTL Program also provides geotechnical analyses for BES and City projects and special inspections as required by local and state building codes.

Equity Impacts

This program is part of BES's overall engineering design and construction approach for capital projects to ensure the same quality standards of design, construction, and materials for any capital project in the city, regardless of neighborhood or community demographics. The result is that no community bears a disproportionate burden because of inferior construction materials.

Changes to Program

Workload expectations within the MTL Program have increased as a result of increases in other work requests from partner bureaus – primarily the Water Bureau's capital program, such as the Washington Park reservoir project.

Ongoing process improvement efforts such as the use of technology tools to schedule and track work requests and activities are underway. Allocation of resources to the Materials Testing Lab Program has stayed relatively consistent in recent years, and no major budget changes are required. The MTL Program includes $40,000 in ongoing budgetary resources beginning in FY 2019-20 to cover overtime for staff who are frequently called out for night work and other time-sensitive capital projects. Overtime expenses have averaged $38,000 annually during the prior three years and have previously been unbudgeted.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	453,868	-8,428	513,622	482,292
Internal Materials and Services	-821,943	-594,686	-807,921	-790,591
Personnel	1,340,426	1,542,201	1,570,655	1,754,172
Sum:	**972,351**	**939,086**	**1,276,356**	**1,445,873**
FTE	13	13	13	13

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services which are offset by charges to other bureaus for testing work done on their behalf.

Expenses: Primary expenses for this program are personnel costs, outside lab services, repair, maintenance and calibration of equipment, ongoing operating supplies for equipment, and license renewals.

Materials testing done for BES capital improvement projects and other internal bureau work are reported as negative expenses in the Internal Services line item for this program (and positive expenses in the Internal Services line item for the requesting program).

Staffing: 13 positions support this program. Positions include Geotechnical Engineers (2), Engineers (2), Materials Testing Technicians (6), Public Works Inspectors (2), and an Office Support Specialist.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Capital Program Management and Controls

Program Description & Goals

The Capital Program Management and Controls Program oversees the Bureau's Capital Improvement Program (CIP). This program manages the capital program planning process, develops the annual capital budget, tracks project delivery performance and recommends long-range capital investment strategies that align with the Bureau's Strategic Plan and ratepayer expectations. As the program responsible for scheduling and monitoring projects in the CIP and managing the overall CIP budget, Capital Program Management and Controls impacts all Bureau performance measures related to capital projects, including combined and sanitary sewer overflows and maintenance costs at the wastewater treatment plants.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Construction management costs as a percentage of total construction costs	9%	14%	10%	12%	0
Linear feet of sanitary and combined sewer pipe repaired or replaced to improve condition and capacity	109,745	93,006	145,000	57,000	0

Explanation of Services

The Capital Program Management and Controls Program has overall responsibility for the Bureau's more than $150 million annual CIP. The program is responsible for balancing funding across a variety of project types and risk drivers; examples include pipe rehabilitation due to degraded condition, stream restoration for water quality and habitat, and green street facility projects for system capacity. The Capital Program Management and Controls Program provides information that guides the processes for evaluating and prioritizing infrastructure investments with a balance of prioritized system needs and financial capacity. The projects in the CIP generally originate from the Asset Systems Management Program. Delivery of the capital projects (i.e., design engineering and construction management) is performed by the Design Services and Construction Services programs.

The Capital Program Management and Controls Program does the following:

- Develops BES's annual capital budget and five-year CIP
- Monitors and adjusts the capital budget and program
- Provides project change control and other support functions for CIP delivery
- Coordinates the implementation of CIP projects with other BES work groups
- Provides technical standards, best practices documentation and training support

Equity Impacts

Equity impacts are a critical factor in the evaluation and prioritization process of the Bureau's capital improvement projects. In the system/facilities planning process for both the combined sewer collection system and the stormwater system, projects are ranked and prioritized against all other needs within that system, with the additional consideration of equity impacts. Then, when priority projects from each system plan or regulatory driver are evaluated against each other in the annual CIP development process, scoring includes impacts to human health and safety, business customers and residential customers, along with impacts to public infrastructure such as streets. New for FY 2019-20, a triple bottom line approach to scoring was performed by an independent team, made up of staff from various divisions. The scoring criteria included a section dedicated to Bureau and City Strategic Plan initiatives, with equity being the main focus. In the prioritization of projects, more consideration was given to projects in disadvantaged communities or communities of color.

Changes to Program

Collectively, the overall quality of sewer and stormwater infrastructure has declined as the Bureau prioritized completion of the $1.4 billion Combined Sewer Overflow project from 1991-2011. Additionally, the market for materials and labor has recently been more volatile. Within a resource-constrained environment, the Bureau has been challenged in recent years to ensure that capital investment is optimized to prevent service interruptions and minimize inefficiencies. Beginning in FY 2017-18, the Bureau set a target to significantly increase CIP output to ensure sustainable reinvestment in infrastructure over the long term. The FY 2018-19 adopted CIP was $133 million, a 17 percent increase over the prior year level. The FY 2019-20 annual CIP is $177.6 million, a 33 percent increase over budgeted FY 2018-19. Nearly all of the FY 2019-20 increase is driven by accelerating the Bureau's $37 million contribution to the Portland Building Reconstruction project one fiscal year earlier, at the request of the Office of Management and Finance. The total 5-year CIP is currently targeted at $783 million (approximately $157 million annually on average). Despite the large portion for the Portland Building Reconstruction project, this also represents a significant increase in Bureau capital project work. The increase is straining a workforce that already relies on consultants and contracted staff to meet project planning, design and construction challenges.

As the Bureau improves its capital investment strategy, and in support of the Bureau's strategic initiative to align the budget, CIP and financial planning process with priorities in the Strategic Plan, we cannot expect to deliver services efficiently using the legacy program controls methodology. The Bureau needs more sophisticated project controls, which it is pursuing via a combination of major process improvements, reconsideration of responsibilities Bureauwide and staffing increases over multiple years. Beginning in FY 2018-19, dozens of process improvements were incorporated into the CIP implementation procedures, and an ongoing revamping of project scheduling is underway (as are multiple other process improvements).

Beyond specific capital project changes, the major budgetary change within the Capital Program Management and Controls Program in the FY 2019-20 Adopted Budget is the addition of $600,000 in ongoing resources to fund the Bureau's required contribution to the Citywide Community Opportunities Enhancement Program (COEP), as authorized by City Council via Resolution No. 37331, adopted on July 12, 2017. Resources contributed to the COEP are intended to increase diversity and equity in contracting Citywide and provide opportunities for minorities and women in the workforce and disadvantaged, minority-owned, women-owned, and emerging small businesses (D/M/W/ESB); these efforts are consistent with the Bureau's strategic priorities. Bureau contribution amounts are based on the total value of construction contracts, which BES estimates will be $60 million for FY 2019-20. The Bureau will adjust the budgeted amount annually as needed to match CIP construction contract expectations and meet this City requirement.

Additionally, the budget includes the conversion in FY 2019-20 of a limited-term employee (Training Coordinator) to an FTE. This position was originally created to focus on training needs related to implementation of the Bureau's capital project management software (i.e., Heron). However, as the Bureau aims to improve its capital project management processes – including optimal use of software – this position has been identified as critical to providing ongoing training support for the Heron tool, as well as implementing new processes and best practices.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	53,119,943	58,004,524	84,639,360	91,994,455
External Materials and Services	14,039,099	14,794,924	24,240,716	20,848,547
Internal Materials and Services	14,666,088	15,645,006	7,077,384	7,659,018
Personnel	11,720,329	12,459,377	17,760,746	20,566,018
Sum:	**93,545,459**	**100,903,831**	**133,718,206**	**141,068,038**
FTE	128.03	133.06	13.95	139.4

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: The primary expense for this program is the Bureau's Capital Improvement Program (the "CIP"). Personnel are allocated from other programs to support the CIP. External Materials and Services costs include contract staff, outside design and construction consultants, and other services necessary to develop and complete capital projects. Internal Services reflects costs of partner bureaus that assist in the implementation of the CIP and include PBOT, Parks, and the Water Bureau.

Staffing: 9 positions support this program with an additional 130.4 positions allocated from other programs to support the capital improvement portion of this program. Positions include Analysts (6), a Coordinator III, an Engineering Technician II, and a Manager II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Systems Development

Program Description & Goals

The Systems Development Program (moved from the Engineering Services and Pollution Prevention Groups to the Director's Office in FY2018-19) provides all private development-related services on behalf of BES, including early assistance, land use review, building permit review, stormwater facility inspection, public works projects and source control review—all to support City development goals and ensure consistency with regulatory requirements and BES's infrastructure system needs. The Systems Development Program includes the Transportation Interagency Program, the Sewer Extension Program, and the Nonconforming Sewer Program (with support from the Revenue Programs division within the Business Services Group).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

BES development review functions, which are provided by the Systems Development Program, are critical to ensuring the continued issuance of land use reviews, building permits and public works permits. BES ensures that adequate sanitary and stormwater services are available to serve proposed development.

Customer service to support applicants through the development review process is a critical component of the work of the Systems Development Program, as is ensuring that approved projects are adequately protective of the BES system, human health and the environment. Most Systems Development Program functions are co-located with the Bureau of Development Services and the other City development-related functions, allowing real-time coordination between bureaus and with customers, to best meet targets and goals related to supporting development.

The Nonconforming Sewer Program (NSP) assists Portlanders by resolving shared and private sewer situations. Many properties across the City share sewer laterals with neighboring properties or have a private sewer line in the right-of-way. Nonconforming sewer laterals become problematic when they fail and need to be repaired/replaced, or when properties are sold or redeveloped. The NSP is working to resolve as many of these situations as possible, cost-effectively, through the capital improvement CIP process. However, many nonconforming situations must be resolved more quickly than the CIP can accommodate, because of home sales or redevelopment schedules. These urgent situations require a high level of customer/public support if they are to be resolved in a timely way.

The Systems Development Program is responsible for the following activities:

• Review and evaluation of early assistance and land use reviews
• Implementation of the Bureau's drainageway protection rules
• Building permit review for sanitary connections, stormwater management, and pollution prevention/ source controls
• Permitting and design oversight of public works projects related to new development or redevelopment
• Provision of broad liaison services to the regional transportation agencies while ensuring conformance with BES stormwater management requirements and design standards
• Design and project management of sewer service extensions
• Conversion of existing substandard sewer connections through customer service, outreach, permitting, design and construction of new sanitary sewers
• Private stormwater facility inspection
• Sewer connection permits
• Customer service to support the City's unified and co-located permitting system
• Advocacy for BES and its ratepayers through participation in broader Citywide planning projects and negotiation of development agreements

Equity Impacts

The Systems Development Program is a customer service-focused division that provides permit review functions and customer support, both face-to-face and by phone. Division staff routinely attend customer service and equity training and seek ways to improve assistance to home and property owners who have little experience with permitting.

The Nonconforming Sewer Program identifies and supports potentially eligible candidates in accessing the available financial assistance and deferred payment options. Many NSP properties are on older, smaller and subdivided lots, and some NSP areas overlap with high percentage minority and/or low-income Census tracts. In addition, helping existing property owners resolve issues related to nonconforming sewers can help those residents stay in their homes and/or reap full value of home at sale, rather than being forced into selling at a lower price when their sewer is not in compliance.

Changes to Program

Because of the growing economy and desirable development factors, pressures on development review and the Systems Development Program have increased significantly over the past few years. BES has added staff and continued to refine and improve processes to reduce permitting timelines and ensure that customer service goals are met.

In February 2018, BES implemented an internal reorganization in response to Mayor Wheeler's request that permitting bureaus improve review turnaround times. This reorganization moved the Source Control Plan Review Section from the Environmental Compliance Division (within the Pollution Prevention Group) into the Systems Development Division. In addition, the Systems Development Division was moved into the Director's Office. At the time, Source Control Plan Review timelines were approximately 4 to 6 weeks behind in commercial plan review. Through continued process improvements and work load prioritization, timeline goals improved and were met for much of the remainder of 2018.

BES is finalizing the reorganization through a small handful of reclassifications, to ensure adequate supervisor/employee ratios, and providing key lead worker positions to guide day-to-day work. After the reorganization, a new Customer Service Supervisor position will oversee a team focused on customer service in the Development Services Center (DSC), where up to five BES staff currently provide face-to-face customer support five days and one evening a week; this includes issuing Sewer Connection Permits. The nature of this work is demanding, with customers needing immediate attention and conflicts requiring timely resolution.

A total of $299,500 in ongoing budgetary adjustments is included in FY 2019-20 to accommodate (1) hardware/software costs to support implementation of the City's new Portland Online Permitting System (POPS), (2) increased bank card fees that facilitate customer ease of payment, and (3) interagency agreements with PBOT related to increased costs of service for Sewer Connection Inspections and the Public Works Permitting Program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	382,235
External Materials and Services	454,297	630,799	239,896	728,896
Internal Materials and Services	949,420	1,127,915	984,274	868,257
Personnel	3,276,299	3,419,300	2,730,052	3,793,512
Sum:	**4,680,016**	**5,178,014**	**3,954,222**	**5,772,900**
FTE	23.7	22.05	27	28.55

Resources: Resources for this program come from ratepayer fees and charges for Sewer and Stormwater services offset by system development permit fees and connections charges.

Expenses: The primary expenses in this program are personnel, Capital Outlay, bank card fees for customer permit payments, professional development and training costs, and ongoing costs related to the Portland Online Permitting System. Internal services include facility rental for the workspace in the 1900 Building and PBOT sewer connection inspection fees and permitting services.

The amount in Capital Outlay reflects a realignment of budget and actuals to this program which manages the permit project related work. The costs were previously reported in the Capital Program Management and Controls Program.

Staffing: 33 positions support this program with approximately 6 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include Engineers (22), Planners (5), Environmental Technicians (3), an Environmental Program Coordinator, a Manager I, and Supervisor II.

Staffing totals for FY 2019-20 reflects 6 Source Control Plan Review FTE moved from the Environmental Compliance Program as discussed above.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Portland Harbor

Program Description & Goals

The Portland Harbor Program provides expert services to manage and act on behalf of the City in its participation in the Portland Harbor Superfund cleanup, along with the Natural Resource Damage Assessment (NRDA) settlement process and related restoration efforts. Expert services include legal, policy and program administration, technical support and public involvement support. Because of the City's significant economic, environmental and cultural interest, along with its status as a potentially responsible party, the Portland Harbor Program works closely with other City bureaus to be a leader in accomplishing a successful cleanup as soon as possible.

The Portland Harbor Program goals include:
• protecting and enhancing environmental and human health
• maintaining a working harbor, and
• advocating for a fair allocation of cleanup costs among all potentially responsible parties.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The City is a steward and regulator of the Willamette River and is also one of more than 100 parties that are potentially responsible for cleanup costs. As such, the City has long been involved in the Portland Harbor Superfund project, working to ensure that the interests of Portlanders are represented. The Portland Harbor Program is made up of four main support areas that work closely together to achieve programmatic goals.

• Policy and program administration support provides leadership and strategic guidance for the Portland Harbor Program, along with services for stakeholder engagement, government relations, program development, operational oversite and coalition building to advance cleanup implementation.

• Legal support provides services in defending the City in its involvement and potential liability associated with the Comprehensive Environmental Response, Compensation, and Reliability Act (CERCLA) process, the allocation settlement process, the Natural Resource Damage Assessment settlement process and associated lawsuits. Legal support also provides services in developing partnership agreements to facilitate collective action toward cleanup implementation, and cleanup agreements with EPA.

• Technical support provides services by protecting City assets, preventing recontamination of the river, investigating and controlling sources of contamination, planning and implementing cleanup work, performing environmental risk assessments, coordinating with other technical programs throughout the Bureau and City and managing projects.

• Public involvement support provides services in developing, implementing and managing a community involvement program designed to build and strengthen relationships with diverse community stakeholders and encourage community involvement in the cleanup process. The public involvement support area also works closely with other government agencies on public health and risk communication, along with environmental justice issues related to the Superfund cleanup.

Equity Impacts

The Portland Harbor Program recognizes past inequities and is actively promoting equity and environmental justice through meaningful involvement of Portland's diverse communities in the cleanup. The new Portland Harbor Community Involvement Program is being developed in partnership with community groups to ensure that those who are disproportionality impacted by the contamination and/or cleanup itself have an opportunity to be involved in the cleanup process.

Changes to Program

The Superfund cleanup process is heavily influenced by external factors, such as EPA oversite, legal settlement processes, individual site negotiations, and the willingness of potentially responsible parties to move forward with their respective cleanup responsibilities. These factors change frequently, which requires the program to maintain a high-level of flexibility.
As the Portland Harbor Superfund Project moves into the remedial design phase, program expenditures are likely to increase in the near term. The FY 2019-20 Adopted Budget includes a $6.0 million transfer from the Environmental Remediation Fund to the City's Portland Harbor Superfund Reserve to meet the City's first payment obligation under the Settlement with the U.S. Environmental Protection Agency for Certain Portland Harbor Remedial Design Costs authorized by Ordinance 189509. Under this agreement with EPA, the City and State of Oregon will establish a trust and fund it up to $12 million each, for a total of $24 million over the next three fiscal years in order to take steps towards meeting our responsibility as potentially responsible parties. The trust is intended to reduce the City's risk of enforcement action by the EPA, reduce transaction costs that would be incurred during negotiating and performing numerous design agreements, and encourage timely action throughout the 10-mile site.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	-192,150	500,753	1,469,081	1,019,081
Internal Materials and Services	762,463	733,042	837,952	829,964
Personnel	395,097	476,208	609,764	605,598
Fund Expense				
Fund Transfers - Expense	0	0	0	6,000,000
Sum:	**965,410**	**1,710,003**	**2,916,797**	**8,454,643**
FTE	3.2	4	4	4

Resources: Resources for this program come from ratepayer's Willamette River/ Portland Harbor Superfund Charge.

Expenses: Primary expenses for this program are personnel, External Materials and Services for outside legal assistance and costs related to communications. Internal Services are primarily City Attorney, sampling and monitoring, and laboratory costs.

Staffing: 4 positions support this program. Positions include Coordinators (2), a Manager I, and an Analyst III.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Portland Harbor CERCLA (Superfund)

Program Description & Goals

The CERCLA Program area is dedicated to holding certain segregated funds related to the Portland Harbor Program for the Comprehensive Environmental Response, Compensation, and Liability Act (CERCLA). Please see the Portland Harbor Program narrative above.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Please see Portland Harbor Program narrative above.

Equity Impacts

Please see Portland Harbor Program narrative above.

Changes to Program

Please see Portland Harbor Program narrative above.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	167,112	2,210,812	1,910,812
Personnel	633	2,156	0	
Sum:	**633**	**169,268**	**2,210,812**	**1,910,812**

Resources: Resources for this program come from ratepayer's Willamette River/ Portland Harbor Superfund Charge.

Expenses: Expenses for this program reflect estimated costs for Post Record of Decision expenses. Post Record of Decision expenses may be adjusted as more information about potential City responsibilities become known.

Staffing: There is no staffing related to this program, see Portland Harbor Program.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Portland Harbor NRDA

Program Description & Goals

The NRDA Program area is dedicated to holding certain segregated funds related to the Portland Harbor Program for the National Resource Damage Assessment (NRDA) process. Please see the Portland Harbor Program narrative above.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Please see Portland Harbor Program narrative above.

Equity Impacts

Please see Portland Harbor Program narrative above.

Changes to Program

Please see Portland Harbor Program narrative above.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	1,073,000	1,099,000
Sum:	**0**	**0**	**1,073,000**	**1,099,000**

Resources: Resources for this program come from ratepayer's Willamette River/ Portland Harbor Superfund Charge.

Expenses: Expenses for this program reflect resources made available in the event National Resources Damage Assessment projects are identified.

Staffing: There is no staffing related to this program, see Portland Harbor Program.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Pollution Prevention Administration

Program Description & Goals

The Pollution Prevention Administration Program includes leadership and administrative services that support the Pollution Prevention Services Group (which includes the Environmental Compliance Division, Environmental Monitoring and Investigations Division and the Portland Brownfield Program), thus ensuring smooth operation of a work group that has just over 90 Full Time employees in two work locations.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Pollution Prevention Administration Program is led by the Group Manager, who is responsible for high-level management and oversight of programs within the Pollution Prevention Services Group. The Pollution Prevention Administration Program integrates organizational management, human resources, financial planning, budget development and various administrative support functions of the Pollution Prevention Services Group, to ensure smooth operations of the work group and timely and appropriate responses to internal and external customers, the public, ratepayers and regulatory agencies. The Group Manager provides Bureauwide direction related to organizational operations and capital programs.

Equity Impacts

The Pollution Prevention Administration Program leads and directs the Pollution Prevention Group's implementation of the BES Equity Plan and BES Strategic Plan initiatives to ensure positive racial equity outcomes on all its programs and projects. The program has the authority to issue directives throughout the Pollution Prevention Services Group, and it participates in and supports efforts within the Bureau that further the Bureau's commitment to creating a diverse workforce and an equitable environment within the Bureau and the community. Activities include the following:

- Advocating and supporting efforts to develop multilingual communications to customers
- Participating at the Bureau level to determine recruitment strategies that support a diverse workforce
- Supporting and advancing efforts to employ people with disabilities
- Supporting and encouraging continued participation in career development activities with high school programs in underserved area
- Continuing development and consideration of activities to benefit communities of color or other underserved populations

Changes to Program

In FY 2018-19, a Management Analyst position was added to Pollution Prevention Administration Program to assist with project management and program administrative responsibilities. No major budget changes are required for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	4,372	5,008	29,831	43,250
Internal Materials and Services	14,884	12,011	84,650	824
Personnel	375,313	402,019	532,229	574,127
Sum:	**394,569**	**419,038**	**646,710**	**618,201**
FTE	3	3	4	4

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program include personnel, staff training, and office supplies for the Pollution Prevention Services Group (PPS).

Staffing: 4 positions support this program. Positions include the PPS manager, Analysts (2) and an Office Support Specialist III.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Environmental Compliance

Program Description & Goals

The Environmental Compliance Program manages, interprets and implements City-wide environmental permits and associated state and federal regulations. Through compliance inspections, investigations, technical analyses, data collection and management, program evaluations and policy development, this program helps protect the City's storm and sanitary assets, watershed health and local water quality.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of industrial enforcement tests in full compliance	99%	99%	100%	99%	0
Average resources spent in site investigations and cleanup, per site investigated or remediated	$9,386	$10,629	$9,500	$10,000	0

Explanation of Services

The Environmental Compliance Program manages Citywide environmental programs and permits and performs the associated activities of developing codes and rules, permitting private dischargers, investigating complaints and illicit discharges, inspecting commercial and industrial facilities, establishing and implementing user charges and enforcing codes and rules.

The Environmental Compliance Program manages the following permits and environmental programs:

• Columbia Boulevard and Tryon Creek Wastewater Treatment Plant National Pollutant Discharge Elimination System (NPDES) Permits. These permits regulate the discharge of total suspended solids (TSS), biochemical oxygen demand (BOD) and E. coli to the Columbia and Willamette rivers.

• Phase I NPDES Municipal Separated Storm Sewer System (MS4) Permit. This permit is intended to reduce or eliminate stormwater pollution by directing the operation and management of drainage and roadway infrastructure, parks and natural areas, maintenance facilities and other features of the built and natural environments. The permit also influences construction development standards.

• Underground Injection Control Water Pollution Control Facility (UIC-WPCF) Permit. The UIC-WPCF permit protects beneficial uses of groundwater by reducing or preventing pollutants from public rights-of-way from entering approximately 9,000 City-owned injection wells, which manage stormwater throughout the City.

• Total Maximum Daily Load (TMDL) Program, which ensures that City discharges of certain pollutants (e.g., temperature, bacteria, mercury) to local rivers and streams do not exceed amounts allocated by the Oregon Department of Environmental Quality (DEQ). (DEQ has determined the maximum combined load from point and nonpoint sources that still meets water quality standards).

• Air Contaminant Discharge Permit (ACDP). This permit requires the Bureau to track and report sources of air contaminants. This was recently updated to include air toxics as part of Cleaner Air Oregon requirements.

• Solid waste permit for the management of biosolids at CBWTP. This is a permit to manage and close the Triangle Lake Monofill

close the Triangle Lake Monolith.

• Industrial Stormwater 1200Z permit at CBWTP. This is a permit to manage stormwater discharges from the CBWTP campus to the Columbia Slough.

• Regulation of industrial and commercial facilities through permitting, inspections, monitoring and enforcement of site practices, discharges to storm and sanitary systems and direct discharges to surface waters. This includes the Pretreatment and Industrial Stormwater programs.

• Regulation of nonpermitted industrial, commercial and residential facilities through complaint response, investigations, inspections, monitoring and enforcement of site practices, discharges to storm and sanitary systems and direct discharges to surface waters. This includes the Fats, Oils, and Grease (FOG), Maintenance Inspection (MIP), and Spill Prevention & Citizen Response (SPCR) programs.

• Oversight and assessment of monitored and class average Extra Strength sewer charges for the discharge of high-strength waste from commercial and industrial facilities.

• On-call environmental engineering, investigation, characterization and remediation services provided by Coordinated Site Analysis (managed under the Environmental Investigations and Monitoring Program).

• Technical and financial support for property owners, developers, community organizations, and neighbors who are interested in cleaning up brownfields and recovering neighborhood land. These services are provided by the Portland Brownfield Program (managed under the Pollution Prevention Program).

Equity Impacts

The Environmental Compliance Program has a direct, mandated responsibility to ensure that the environmental programs and permits it manages result in positive equitable outcomes for all communities. These programs provide significant benefits to underrepresented communities, particularly those living near industrial facilities and those relying on direct contact with surface water (e.g., through subsistence fishing).

The Portland Brownfield Program was created directly in response to an environmental justice initiative at the U.S. Environmental Protection Agency (EPA). From the Portland Brownfield Program's inception, a central goal has been to address the environmental burden that brownfields create in neighborhoods. According to a recent Metro report, brownfields are three times more likely to exist in underserved communities. The Portland Brownfield Program focuses on neighborhood brownfields: smaller commercial sites, like former gas stations and dry cleaners, that are often found close to homes, schools and businesses. The program provides financial assistance to clean up sites that will provide benefit to existing community. Project partners that have received assistance from the Portland Brownfield Program include Verde, Black United Fund, Oregon Food Bank, Hacienda CDC, Dharma Rain Zen Center, Albina Youth Opportunity School, Community Energy Project, Proud Ground and REACH CDC.

The Coordinated Site Analysis (CSA) team supports the equitable provision of utilities and watershed improvements, as well as remediation of contaminated areas that have the potential to pose unacceptable risk to human health and the environment.

Changes to Program

Environmental Compliance Program responsibilities and priorities depend greatly on changes to regulations at the federal, state and local level; new and reissued permits; and new permit conditions. Program expectations can change based on newly emerging pollutants and industries, changes to the City's sewer system and changes to practices and regulations that affect industrial and commercial facilities. More stringent state and federal requirements have led to a greater need for staffing and professional resources because City-held permits are more complex and prescriptive and have more stringent discharge standards. It is critical that the Bureau develop a more standardized and robust data management system to support compliance.

The Portland Brownfield Program uses U.S. Environmental Protection Agency (EPA) funding for many projects; however, EPA funding has become more competitive and less stable in the past year. At the state level, new and proposed legislation has created opportunities for new types of brownfield incentives in Oregon.

With the CBWTP on the 2019 NPDES permit issuance list, the Environmental Compliance Program has needed to carry out additional monitoring, develop more reports and submit more data and reports. DEQ air toxics regulations from 2018 will require more scrutiny of our system, more reporting to DEQ and potentially additional air control upgrades at CBWTP. The 1200Z Industrial Stormwater permit was issued in 2018 with additional monitoring requirements that affect compliance at the CBWTP and the Environmental Compliance Program's oversight of 500 regulated industrial facilities.

The Environmental Compliance Program has adapted to meet these new demands. Staff are actively engaged in legislative efforts to sustain and grow brownfield resources at both the state and federal levels, and the program is implementing process improvements to facilitate anticipated increases in BES capital improvement projects, utility coordination with the Bureau of Transportation and Water Bureau and support of broader City initiatives. The program is moving to a new data management system, which has been under development for approximately five years. This will greatly improve program efficiencies (e.g., inspections, enforcement, data management and cross-program activities). Additionally, the program is cross-training staff in multiple program areas to improve multimedia industrial inspections (e.g., Industrial Stormwater staff inspecting MIP facilities when possible), and it is developing program audits to evaluate the City's compliance with permit requirements.

In FY 2018-19, the Environmental Compliance Program added three new positions, including an Environmental Technician in Industrial Stormwater to keep up with the new DEQ 1200Z industrial stormwater permit, an Environmental Technician to keep up with the pace of development and growth in the City (monitoring about 400 new properties per year) and an Environmental Program Coordinator in Spill Prevention & Citizen Reponse to better manage large investigation and enforcement workloads.

The Environmental Compliance Program no longer has internal support for modeling, as that function is no longer available from the Asset System Management program. The primary budgetary addition in FY 2019-20 is adding a GIS Technician III to conduct data maintenance, data scrubbing, QA/QC, database tool maintenance, UIC registrations and monthly/annual database reporting in support of the UIC permit. The technician will also perform outfall mapping and management, maintain the MS4 outfall database and be the liaison between multiple Bureau program areas to ensure communication, coordination and correlation between databases and general system management related to UIC and MS4 asset data.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	3,815	123,381	112,500	120,000
External Materials and Services	853,484	907,206	2,502,295	1,719,102
Internal Materials and Services	635,933	587,009	803,517	828,731
Personnel	4,662,682	5,008,592	6,470,164	6,373,431
Sum:	**6,155,914**	**6,626,187**	**9,888,476**	**9,041,264**
FTE	49	51	55	50

Resources: Resources for this program come from ratepayer fees and charges for Sewer and Stormwater services. Additionally, this program receives revenue from permit fees and civil penalties for environmental contamination.

Expenses: Expenses for this program include personnel, licenses and permit fees (including penalties), costs for contaminated site evaluation and reporting, Department of Environmental Quality cleanup oversight, staff training, and minor equipment and tools. Capital outlay reflects life-cycle replacement vehicles.

The increases in personal services since FY 2016-17 are attributable to several changes in regulatory program requirements for compliance with City of Portland permits as well as rapid increases in commercial and industrial development requiring review and ongoing regulatory oversight, permitting, inspections, and monitoring by Environmental Compliance staff.

Staffing: 50 positions support this program. Positions include Coordinators (4), Engineers (2), an Environmental Program Coordinator, Environmental Specialists (10), Environmental Supervisors (5), Environmental Technicians (25), a GIS technician III, a Hydrogeologist, and a Manager II.

Staffing totals for FY 2019-20 reflect 6 FTE from the Source Control Plan Review Section moved to the Systems Development Program.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Environmental Investigation and Monitoring

Program Description & Goals

The Environmental Investigation and Monitoring Program (within the Pollution Prevention Group) provides the City with cost-effective and customized environmental monitoring and laboratory services, along with high-quality data delivery and technical consultation that support the Bureau's regulatory objectives and requirements, conveyance system data needs, watershed assessments and property investments.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of lab analyses performed each year	61,243	53,340	55,000	60,000	

Explanation of Services

The Environmental Investigation and Monitoring Program supports (1) the Bureau's compliance with major environmental permits and regulations, and (2) programs managed by the Bureau to protect and improve surface water, groundwater, stormwater, sediment, soil and habitat quality. The program staff is specialized in the following areas:

• Investigations & Monitoring Services (IMS), which provides project design, project management, data analysis and data reporting services for BES monitoring projects, plus project management for non-City agencies that use the Water Pollution Control Laboratory

• Field Operations, which provides cost-effective, high-quality environmental monitoring services to internal BES stakeholders in support of the Bureau's regulatory, engineering, and scientific programs

• The Water Pollution Control Laboratory (WPCL), which analyzes wastewater, stormwater groundwater, surface water, biosolids, sediment and soil in support of the City's regulatory requirements, wastewater operations, Capital Improvement Program (CIP) and other environmental programs, such as watershed management and restoration

• Data Acquisition & Management (DA&M), which collects and communicates critical operational, environmental and emergency information related to the City's wastewater and stormwater collection systems to support the Combined Sewer Overflow program and asset, operational, management and planning needs

Equity Impacts

BES applies an equity lens to all of its Bureau programs and services and is required by state and federal regulators to ensure the equitable distribution of its basic, sanitary and stormwater services that protect public health and the environment.

Changes to Program

The Environmental Investigation and Monitoring Program responsibilities and priorities depend greatly on changes to regulations at the federal, state and local level, including changes to environmental permits and regulatory standards or requirements. Additionally, workloads are influenced by (1) the nature and magnitude of work conducted by our utility partners and within the Bureau's own CIP, (2) emerging pollutants, and (3) new or evolving industries and/or industry sectors.

The Oregon Department of Environmental Quality (DEQ) has placed the Columbia Boulevard Wastewater Treatment Plant (CBWTP) on the 2019 National Pollutant Discharge Elimination (NPDES) permit issuance list. This has required additional monitoring to support compliance deliverables, along with increased monitoring in response to biosolids management challenges at the CBWTP. Additionally, new state and federal regulations to control specific pollutants, such as mercury, and increased demand for low-level pesticides analyses (compounded by the unreliability of timely services from contract laboratories) have compelled the Investigation and Monitoring Program to develop capability to provide these services from within. Lastly, demand for program services continues to be high, particularly for flow monitoring in the sanitary, combined and stormwater sewer systems to support system planning needs and Bureau improvements to the BES CIP process.

The Investigation and Monitoring Program identified service gaps in its data management systems. System improvements are necessary to increase data accessibility to support development standards for the Stormwater Management Manual, to maximize the value of Portland Area Watershed Monitoring and Assessment Program (PAWMAP) information and to enhance regulatory reporting for NPDES and Underground Injection Control (UIC) permit requirements. Some of this work is currently progressing via software acquisition, business process improvements and expansion of monitoring stations, radio networks and data centers to support new service areas and data gaps affiliated with stormwater system planning.

In FY 2018-19, the Investigation and Monitoring Program added an Electronic Systems Technician within Data Acquisition & Management to address HYDRA system installation, operation and maintenance requirements and a Laboratory Analytical Specialist to the WPCL to provide dedicated oversight in the Nutrients Section. A number of reclassifications were implemented in FY 2018-19 to improve data management and better support Field Operations projects, oversight and consistency.

Adjustments in the FY 2019-20 Adopted Budget include the addition of a two-person Field Operations team (and a vehicle) to manage increased demand for short-term flow monitoring data for modeling and predesign within the CIP. Additionally, the budget adds a Business Systems Analyst (working closely with MDAS in the Bureau's Information Management Program) to address data challenges. This position was requested and initially supported for funding in FY 2018-19 but was removed very late in the budget process to limit total FTE requests.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	149,623	167,354	480,000	385,000
External Materials and Services	730,779	864,925	1,248,602	1,242,762
Internal Materials and Services	-2,611,880	-2,678,557	-3,348,095	-3,363,690
Personnel	4,188,235	4,317,685	4,781,298	5,434,754
Sum:	**2,456,757**	**2,671,407**	**3,161,805**	**3,698,826**

	FTE	37	38	39	42

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program include personnel, costs for external laboratory work, training, chemicals, repair and maintenance of equipment, and utility charges for the Water Pollution Control Lab.

Laboratory testing and Field Operations sampling and monitoring done for BES capital improvement projects and other internal bureau work are reported as negative expenses in in the Internal Materials and Services line item for this program.

Capital Outlay reflects appropriation for replacement of life-cycle vehicles, sampling and monitoring equipment, and laboratory equipment.

Staffing: 42 positions support this program. Positions include Business Systems Analysts (2), a Communications Engineer, a Coordinator III, Electronic Systems Technicians (4), Environmental Specialists (2), Field Science Specialists (6), Field Science Technicians (5), Laboratory Analysts II (6), Laboratory Analytical Specialists (6), Laboratory Coordinators (3), a Laboratory Manager, a Manager I, a Manager II, a Statistician, a Storekeeper Specialist, and a Supervisor II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Watershed Services

Program Description & Goals

The Watershed Services Program provides leadership and administrative support to the employees in the Watershed Services Group and coordinates Citywide efforts to improve watershed health, support sewer system needs and comply with state and federal environmental regulations. The Watershed Services Program also coordinates the acquisition of natural areas to meet stormwater system objectives.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Watershed Health Index for water quality	5.90	5.50	5.90	5.90	0

Explanation of Services

The Watershed Services Program provides management and administrative services for the Watershed Services Group. Staff in this program, reporting directly to the Watershed Group Manager, coordinate a variety of group and Citywide efforts, including land acquisition, the Watershed Investment Program, training and other special projects. Two administrative staff provide clerical, budget, administrative and purchasing support for the Group.

Primary functions include the following:

- Watershed program management: manage and direct watershed programs and activities
- Personnel management: plan, organize, direct and evaluate the performance of managers and staff, including their professional development
- Watershed portfolio management: provide leadership for policy and program development and implementation
- Interbureau, interagency, and stakeholder coordination
- Natural areas acquisition and restoration planning
- Budget management: develop and monitor budget, contract and transaction support
- Administrative, clerical, and purchasing support and training

Equity Impacts

Projects and activities within the Watershed Services Program provide multiple benefits to communities throughout Portland, and the work is increasingly planned and implemented using an equity lens. Land acquisition programs protect and restore natural areas in low-income, racially diverse and underserved communities throughout Portland, providing both watershed and public health benefits.

Changes to Program

Turnover in the Senior Administrative Specialist position during FY 2018-19 has left the position vacant for several months, impacting program productivity. This position will be filled temporarily as a limited-term hire to maintain flexibility for tailoring administrative needs to be responsive to ongoing discussions about potential bureau reorganization.

There have been no significant program changes to Watershed Services in the past year, and no budgetary changes are necessary in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	35,000	35,000
External Materials and Services	52,806	70,341	90,840	90,840
Internal Materials and Services	60,212	95,626	80,742	45,207
Personnel	407,451	512,649	606,777	589,608
Sum:	**520,469**	**678,616**	**813,359**	**760,655**
FTE	4.2	5	4	4

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program include personnel, capital outlay for a new vehicle, external costs for staff training, real estate professional services, and post stabilization property management. Internal services include printing and distribution, telecommunications, fleet motor pool, and PBOT Right of Way Services for land acquisition.

Staffing: 4 positions support this program. Positions include the Watershed Services Group manager, and Administrative Specialist II, an Analyst II, and an Environmental Specialist – Generalist.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Science, Fish and Wildlife

Program Description & Goals

The Science, Fish and Wildlife Program (within the Watershed Services Group) provides expert scientific and technical assistance to all Bureau programs and the City on environmental policy, planning, projects, regulations and monitoring. This program also leads the City's Invasive Species Program and manages the City's compliance with the Endangered Species Act.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Watershed Health Index for water quality	5.90	5.50	5.90	5.90	0

Explanation of Services

The Science, Fish and Wildlife Program (also known as the Science Integration Division) provides scientific and technical assistance through the work of two teams: the Biological Sciences Team and the Ecosystem Sciences Team. This program collects, analyzes, applies and communicates the best available science to ensure that City policies, programs and projects protect and restore watershed health and achieve regulatory compliance.

• The Biological Sciences Team is responsible for the City's Invasive Species Program, watershed planning, improvements in the mainstem Willamette River and integration of the Terrestrial Ecology and Enhancement Strategy (TEES) into BES operations. The team provides expert services to BES in botany, wetlands, wildlife, mitigation banking, fish passage and pesticides/herbicides.

• The Ecosystem Sciences Team is responsible for the City's Endangered Species Act compliance; federal, state and tribal fisheries partnerships; the City's Streamlining Team for coordinating federal, state and local environmental permits for any City project in water; watershed and project monitoring; and public engagement. The team provides BES with expert services related to hydrology, water quality, ecosystems, fisheries, and natural resource regulations.

Equity Impacts

The Science, Fish & Wildlife Program works closely with regional tribes and the Native American community on protecting and restoring health fish populations of significant cultural importance, including salmon and lamprey, and on opportunity areas for traditional First Foods. This includes partnerships on the Columbia River Treaty, the Lamprey Conservation Agreement and the Salmon in the City celebration at Westmoreland Park.

The program also aids in understanding and responding to environmental justice issues in Portland, including evaluating climate impacts across Portland and disparate impacts on low-income communities. The proposed budgetary addition in FY 2019-20 for gauges to establish flood warning systems are of particular value in the Johnson Creek floodplain area.

Changes to Program

There have been no major budgetary changes to the Science, Fish & Wildlife Program in the past year. However, in response to a changing regulatory climate, the program has taken the lead on exploring natural resource mitigation banking for the City, primarily to support BES' and other bureaus' natural assets. Based on needs throughout the Bureau and the focus on the BES Strategic Plan, the program expects to allocate more resources in the future to support the natural resources components of system planning, risk assessment and monitoring.

The only discretionary budget adjustment for this program in FY 2019-20 is an ongoing increase of $82,000 for expansion and extension of a contract with the U.S. Geological Survey (USGS) for gauges to establish flood warning systems.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	289,856	554,123	459,658	470,800
Internal Materials and Services	610,764	490,628	524,677	475,533
Personnel	1,603,715	1,775,365	1,672,694	1,721,529
Sum:	**2,504,335**	**2,820,115**	**2,657,029**	**2,667,862**
FTE	11.55	11.55	13	10.8

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: The Primary expenses for this program include personnel, external costs for hydrologic and water quality assessment, project effectiveness monitoring, Salmon Safe Program implementation, invasive contract herbicide application, and fish monitoring.

Staffing: 13 positions support this program with approximately 2.2 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include a Botanic Specialist II- Generalist, a Coordinator III, an Environmental Program Coordinator, Environmental Specialists – Generalists (8), a Manager I, and a Manager II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Sustainable Stormwater

Program Description & Goals

The City's stormwater system is a complex network of natural and constructed assets on public and private property and in the public right-of-way. The Sustainable Stormwater Program integrates stormwater system planning, stormwater polices and design guidelines with implementation, technical assistance and stewardship of the City's stormwater assets.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of trees planted	10,483	22,795	12,000	12,600	0
Number of stormwater flooding events due to system capacity	111	60	100	100	0

Explanation of Services

Although the City does not own all stormwater assets in the system, the City relies on the complete stormwater asset network to provide critical community functions, including conveyance, storage, treatment and habitat. The stormwater system includes tens of thousands of pollution-reduction and flow-control facilities like green streets, UICs and ponds; thousands of acres of wetlands; hundreds of miles of ditches and pipes; and hundreds of miles of streams and rivers. Major subprograms of the Sustainable Stormwater Program include Stormwater System Planning, Stormwater Management Manual and several implementation efforts.

• The BES Stormwater System Planning (SWSP) identifies and quantifies stormwater system risk within an asset management framework. This allows BES to compare stormwater system risk across all parts of the City, assign priorities based on risk and integrate stormwater projects with other infrastructure needs. Stormwater System Planning is an ongoing effort that guides Bureau investments in stormwater, prioritizing project areas, informing policies and practices to reduce risk, protect existing infrastructure, comply with regulations and improve watershed conditions to protect public health and the environment.

• BES's Stormwater Management Manual (SWMM) provides policy and design requirements for stormwater management on all development, redevelopment and improvement projects in Portland on private land, public property and public rights-of-way. These requirements are in response to a number of regulations and system needs. Publishing the SWMM involves revising it regularly to reflect current system needs, regulatory requirements and technical standards. Design updates are informed by Sustainable Stormwater's research and monitoring of stormwater facility performance.

• The Stormwater Implementation and Technical Assistance section provides technical assistance on stormwater facility design and operation to City staff, consultants and private property owners. The Private Property Retrofit program works with other Bureau programs and with private landowners to assess existing stormwater conditions and implement and support projects and programs on non-BES assets that advance the City's stormwater goals.

• The Stormwater Stewards program manages stormwater sustainably by expanding and protecting Portland's urban forest and maintaining green streets, through the Environmental Services Tree Program (ESTP) and the Green Street Stewards (GSS) Program.

Equity Impacts

The Sustainable Stormwater Program incorporates equity considerations into the risk evaluation and on-the-ground implementation programs to prioritize stormwater investments equitably. For example, the ESTP prioritizes its work in areas with low-tree canopy, low-income residents and communities of color. A minimum of 75 percent of ESTP's trees are planted in these equity geographies. Stormwater System Planning is using the Bureau of Planning and Sustainability's data on vulnerable communities from the City's Comprehensive Plan to inform where and how BES prioritizes stormwater investment.

Changes to Program

In the past year, the Sustainable Stormwater Program has experienced several changes that will be continuing in FY 2019-20 and beyond. The ongoing Stormwater System Planning effort has been ramping up in recent years and is expected to continue to be a major driver for resource requests in the coming years. A new subprogram, Stormwater Asset Inventory and Condition Assessment (AICA), will gather data and technical information about the condition of assets in the collective stormwater system Citywide. This is intended to bring the Bureau's knowledge about stormwater asset condition in line with its knowledge of other Bureau systems, like the sanitary system.

A combined increase in program funding of $690,000 is included in FY 2019-20 to accommodate a crew of two Engineering Technicians to collect field data and records research to support the AICA efforts, and to fund PTE contract support to inventory and assess both natural and constructed stormwater system components and assist with development of user-friendly mapping tools and other technology solutions.

Additionally, the Sustainable Stormwater Program budget makes a one-time increase of approximately $350,000 to fund (via interagency agreements) staff in the Bureau of Planning and Sustainability (BPS) that support BES's strategic initiatives related to stormwater management and watershed health. BES supports BPSs' efforts to secure permanent funding for these important Citywide efforts that benefit multiple bureaus.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	24,036	29,629	0	0
External Materials and Services	742,837	845,862	3,068,909	3,415,569
Internal Materials and Services	90,429	92,922	225,334	525,646
Personnel	2,335,390	2,893,736	2,785,694	3,427,383
Sum:	**3,192,692**	**3,862,149**	**6,079,937**	**7,368,598**
FTE	23	20.4	29	24.85

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: The Primary expenses supporting this program include personnel, external costs for the Private Property Retrofit Program, Stormwater Management Manual assistance services, Stormwater System Plan consultant assistance, and tree planting expenses (including Street Trees). Internal services include laboratory and Field Operations for sampling and monitoring as well as a one-time interagency agreement with the Bureau of Planning and Sustainability.

Staffing: 31 positions support this program with approximately 6.15 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include Business Systems Analyst (2), Engineers (11), Environmental Program Coordinators (2), Environmental Specialists – Generalists (7), an Environmental Supervisor, Environmental Technicians (4), landscape Architects (3) and a Manager II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Watershed Management

Program Description & Goals

The Watershed Management Program develops and implements projects in defined watersheds throughout the City to address stormwater deficiencies, improve water quality and hydrology, mitigate impacts from flooding, protect and restore riparian and shallow water habitat and address sediment contamination. The program leverages support from public and private entities, including grant funding, for watershed projects.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Feet of streambank restored (not cumulative)	20,274	22,311	12,000	12,000	0
Watershed Health Index for water quality	5.90	5.50	5.90	5.90	0
Number of participants in community events, workshops, stewardship, and restoration events	12,595	19,140	10,000	10,000	0

Explanation of Services

The Watershed Management Program collaborates across work groups to implement restoration projects through BES's capital program and other watershed enhancement projects. The program also includes community outreach for stewardship, cultivating partnerships with public and private entities, obtaining grant funding for watershed projects, conducting land use reviews and providing support for environmental permitting. Staff specialize in individual watersheds and become experts in their areas. Watershed Management Program staff members are divided into three teams:

• The Columbia Watersheds Team focuses on the Columbia Slough and areas of the Columbia River watershed that are within the City of Portland. This team coordinates with partners to improve water quality, address sediment contamination and enhance and restore riparian, wetland and shallow-water habitat.

• The Eastside Watersheds Team works to improve the ecological conditions of the Johnson Creek watershed and other watersheds east of the Willamette River, in collaboration with public and private partners. The team leads projects and programs that reduce impacts from flooding, improve surface water quality and hydrologic function and enhance habitat for fish and wildlife.

• The Westside Watersheds Section focuses on subwatersheds west of the Willamette mainstem, including Fanno and Tryon creeks and tributaries that drain directly to the Willamette and Tualatin rivers. This section works closely with City and other partners to address stormwater system deficiencies, support sanitary system improvements that will improve water quality and protect and restore instream habitat.

Equity Impacts

The projects and activities of the Watershed Management Program provide multiple benefits to communities throughout Portland, and the work is increasingly planned and implemented using an equity lens. Examples include:

• The Community Watershed Stewardship Program coordinates with the City's New Portlander Program to provide partnership outreach activities to immigrant and refugee communities.

• The Columbia Slough Sediment Program coordinates with Community Engagement Liaisons to do outreach about sediment contamination and fish consumption to immigrant and houseless communities who fish in the slough.

• Watershed Management partners with the Johnson Creek and Columbia Slough Watershed Councils, which serve racially diverse and low-income neighborhoods in N, NE and SE Portland.

• Johnson Creek floodplain restoration projects reduce the incidence of nuisance flooding in low-income neighborhoods in SE Portland.

• Neighborhood to the River projects integrate trees, green streets and rain gardens into capital project areas providing opportunities to provide the benefits associated with green infrastructure into historically underserved communities.

• Land acquisition programs protect and restore natural areas in low-income, racially diverse and underserved communities throughout Portland, providing both watershed and public health benefits.

Changes to Program

The Watershed Management Program did not undergo significant changes in FY 2018-19. The primary budgetary adjustment in the FY 2019-20 Adopted Budget is an increase of $150,000 to support contracts that will continue to identify project planning in priority areas for risk reduction via future capital or operational solutions. Additionally, the program budget increases by $78,000 ongoing for source investigation sampling of pollutants in the Columbia Slough and $40,000 one-time resources for participating in the Community Rating System (CRS) that encourages floodplain management activities and potentially reduces flood insurance rates.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	501,245	447,031	914,062	1,119,306
Internal Materials and Services	72,501	321,510	253,204	317,625
Personnel	1,621,945	1,814,415	1,909,047	2,180,707
Sum:	**2,195,691**	**2,582,956**	**3,076,313**	**3,617,638**
FTE	14.2	13.87	15.8	14.58

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses:	The Primary expenses supporting this program include personnel, external costs for watershed plan implementation, Community Stewardship Grants, technical services for risk assessment, residential and business outreach, and Street Trees for the Tabor to River project. Internal services include laboratory and Field Operations for sampling and monitoring for the Columbia Corridor Source Investigations.
Staffing:	15.8 positions support this program with approximately 1.22 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include a Coordinator III, Environmental Program Coordinators (3), Environmental Specialists – Generalists (4.8), Environmental Supervisors (3), Environmental Technicians (2), a Manager II, and a Planner.
Assets and Liabilities:	This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Watershed Revegetation

Program Description & Goals

The Watershed Revegetation Program provides vegetation management for stormwater management projects and natural area improvements. As part of the maintenance of City-owned stormwater facilities, the program provides landscape design services, supports stormwater system planning and oversees the maintenance of green streets. This program advances watershed health goals through vegetation and land management to protect and improve water quality, reduce pollutants, improve fish and wildlife habitat and enhance ecosystem services within riparian areas, wetlands and upland areas.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of trees planted	10,483	22,795	12,000	12,600	0
Feet of streambank restored (not cumulative)	20,274	22,311	12,000	12,000	0

Explanation of Services

The work of the Watershed Revegetation Program falls into two primary areas:

• Watershed Revegetation Program Stormwater Operations and Maintenance is responsible for vegetation management of City-owned stormwater management facilities and all maintenance of green streets. The program provides landscape design services and general project support for capital improvement and public works permit projects. Maintenance services include facility inspections, work order management and general oversight and management of contractors responsible for performing field services related to maintenance, irrigation, pruning and planting. The program also provides support for stormwater system planning efforts, implementation of the Stormwater Management Manual and incorporation of green infrastructure into the Bureau's asset management system.

• The Watershed Revegetation Natural Area Program is responsible for managing Bureau property acquired for the purpose of advancing BES's watershed health goals through vegetation and land management projects that protect and improve water quality, reduce pollutants, improve fish and wildlife habitat and generally enhance other ecosystem services within riparian areas, wetlands and upland areas. The program may also enter into agreements to provide similar services on other public and private property. The program provides management and monitoring services on capital improvement projects related to vegetation services that are required to keep BES in compliance with state, local and federal permits. Program staff provide subject matter expertise related to natural area vegetation, natural resource management and habitat enhancement to partners and stakeholders within BES and throughout the City, and with outside entities.

Equity Impacts

Stormwater facilities are located in all areas of the City, and stormwater services are provided equitably to all communities.

Changes to Program

Workload expectations of the Watershed Revegetation Program have increased massively with the Bureau's continued investment in green street assets and growing needs in vegetated natural areas. In FY 2019-20, the Adopted Budget for this program shifts to a model that reduces currently contracted services in favor of four in-house FTEs to perform this same work. Although the budgetary increase (net of contract reductions) is approximately $135,000 ongoing, the Bureau has done substantial analysis to identify that using a better mix of contract resources and FTE will significantly improve service outcomes and the Bureau's ability to fill the revegetation service gaps.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	0
External Materials and Services	2,503,211	3,019,120	1,214,535	1,030,243
Internal Materials and Services	82,532	118,049	59,894	402,543
Personnel	1,120,676	1,128,694	1,046,182	1,472,238
Sum:	**3,706,419**	**4,265,863**	**2,320,611**	**2,905,024**
FTE	8.82	9.92	11	12.92

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: The Primary expenses supporting this program include personnel, external costs for stormwater maintenance, natural area maintenance, native plant acquisition, and planting materials.

Staffing: 15 positions support this program with approximately 2.08 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include Botanic Specialists (7), Botanic Technicians (4), and Environmental Specialists – Generalists, a Landscape Architect, a Supervisor I and Supervisor II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Wastewater Services

Program Description & Goals

The Wastewater Services Program provides leadership and specialized operational and administrative support to approximately 200 employees within the Wastewater Group, whose programs provide the core services of wastewater collection and treatment. The Wastewater Services Program leads the BES Strategic Goal for service delivery, to optimize how BES delivers sanitary and stormwater services, and protects and recovers resources for all Portlanders.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of wastewater processed annually (in million gallons)	36,242	28,901	29,400	29,400	0
Cost to operate and maintain the treatment plants per million gallons treated	$529	$677	$770	$900	0
Percentage of urgent public health and safety related service requests responded to within two-hour timeframe	94%	96%	90%	90%	0

Explanation of Services

The Wastewater Services Program provides high-level oversight and coordination of the wastewater operations staff within the Collection System, Treatment and Maintenance Programs (i.e., the Wastewater Group). Staff within the Wastewater Services Program provide high-level analytical and financial support to management, such as reporting and analysis of services. Areas of responsibility include performance measuring, financial and organizational analyses, information requests, benchmarking and survey responses, developing organizational policies and procedures, financial planning and budget management. The Wastewater Services Program includes Administrative Services for the Wastewater Group and the Work and Asset Management System.

Administrative Services include timekeeping, human resources support, records management, document production and editing, reception services/onsite access, payment processing, mail distribution, administrative and facility support (including keys & access cards) and development of Group-level policies, procedures and business processes. Administrative Services is also responsible for managing the Wastewater Group's Stores and Facilities work units (within the Bureau Support Program) and the Learning and Development work unit (within the Employee Development Program).

Wastewater Group employees use the Work and Asset Management System Administration (WAMSA), a work order and asset management system, daily by to manage the work and assets at two treatment plants and 98 pump stations. This includes maintaining an asset register with detailed attribution; defining, scheduling and triggering preventive, predictive, corrective and emergency maintenance work; recording labor hours; recording work accomplishments; tracking work history; managing parts inventory; procuring materials and services; and providing asset lifecycle costs, analysis and reporting capabilities.

Equity Impacts

BES is required by state and federal regulators to ensure the equitable distribution of its basic, sanitary and stormwater services that protect public health and the environment. The Wastewater Services Program leads and directs the Wastewater Group's implementation of the BES Equity Plan and BES Strategic Plan initiatives to ensure positive racial equity outcomes on all its programs and projects.

Changes to Program

In recent years, the Wastewater Services Program has had a growing need for reliable records management, facilities management and reporting and analysis, including a need for improved coordination across the Bureau and City.

This program adds one permanent FTE position to fund a Community Service Aide II in support of the Project SEARCH program, which provides training and working opportunities for adults with developmental disabilities. BES's participation in an initial pilot of this City program led to identification of a candidate who has the ideal skills to meet an ongoing program need. The position was filled using one-time budget resources in FY 2018-19; the adopted change converts this funding to ongoing.

Despite an increase in administrative burdens and deferred projects to accommodate more and new Bureau and City initiatives, no other new budgetary resources are required for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	161,942	286,692	221,307	217,807
Internal Materials and Services	56,557	15,998	60,000	207
Personnel	1,001,715	1,035,415	973,142	1,018,660
Sum:	**1,220,214**	**1,338,105**	**1,254,449**	**1,236,674**
FTE	8	8	9	8

Resources: Resources for this program come from ratepayer fees and charges for Sewer and Stormwater services. Additional revenues are expected from the sale of Renewable Compressed Natural Gas generated at the Columbia Wastewater Treatment Plant.

Expenses: Primary expenses supporting this program are personnel and external services for common area maintenance and fees, County taxes, security, software licensing and other operational costs.

Staffing: 11 positions support this program with 1 FTE allocated to the Treatment Program, 1 FTE allocated to the Employee Development Program, and 1 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include the Wastewater Group Manager, Administrative Specialists (2), Analyst (3), a Manager I, Office Support Specialists (3), and an Instrument Technician. One newly created Administrative Specialist positions is being funded at 80%. The Bureau is working with Human Resources to develop an appropriate classification for the positions created as part of the Project Search program. This position is expected to be changed to the new classification when it is created.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau:	Bureau of Environmental Services	**Program Contact:**	Ken Bartocci
Website:	https://www.portlandoregon.gov/bes/	**Contact Phone**	(503) 823-6022

Collection System

Program Description & Goals

The Collection System Program (within the Wastewater Group) oversees the complex operation, maintenance and repair of the City's wastewater and stormwater collection system to minimize service interruptions and potential hazards to public health, safety, property and the environment. This program works toward the BES Strategic Goal of Service Delivery, to optimize how BES delivers sanitary and stormwater services, and protects and recovers resources for all Portlanders. The Collection System Program is critical to achieving the goals of minimizing the number of stormwater flooding events due to system capacity (less than 100 per year), and minimizing the number of combined sewer overflows (CSOs) and sanitary sewer overflows (SSOs).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of sanitary sewer overflows	180	168	131	135	0
Number of stormwater flooding events due to system capacity	111	60	100	100	0
Number of combined sewer overflow events	7	3	4	4	0

Explanation of Services

The Collection System Program prioritizes the day-to-day management and performance of the City's wastewater and stormwater collection and pumping facilities. The collection and pumping system includes 98 active pumping stations, 10 step systems, 3,040 miles of pipeline, 683 miles of lateral, 40,789 manholes, 8,625 stormwater sumps, 506,880 linear feet of ditches, 54,700 stormwater inlets and catch basins, 328 trash racks, 148 manufactured stormwater facilities and 2,096 green streets.

The Collection System Manager coordinates resources throughout BES, and from other bureaus and agencies, for effective management and maintenance of the collection system. Operation and maintenance activities include facility design, field inspections, preventative and predictive maintenance, repairs and the management of maintenance contractors and of support for Capital Improvement Program (CIP) projects, public works permitting and a variety of planning and implementation efforts related to the stormwater system. BES's primary operation and maintenance service provider (via interagency agreement) is the Portland Bureau of Transportation Maintenance Operations (PBOT-MO).

Other work units that provide critical, specialized operational and maintenance work for the collection and pumping systems are as follows:

• The Maintenance Engineering team provides expertise on the application of asset management principles to sewer and stormwater operation, maintenance and repairs to ensure that individual infrastructure assets reach an optimal useful service life at an overall least cost. Maintenance Engineers provide guidance and coordination to make decisions rapidly so that service interruptions and hazards to public health, safety, property and the environment are minimized.

• The Pump Station Operation and Maintenance work unit ensures the efficient, reliable operation and mechanical maintenance of 98 pump stations and related infrastructure.

• Electrical and Instrumentation installs, maintains, troubleshoots and repairs a variety of electrical equipment and instruments at the City's wastewater treatment plants and pump stations.

• Industrial Coatings provides corrosion/weathering protection of exposed surfaces and applies industrial labelling for proper identification of piping/equipment and the warning and/or elimination of hazardous conditions.

• The Automation Support Team (allocated between both the Collection System Program and the Treatment Program) develops strategies for automating hardware and software to improve the efficiency of collection and treatment facility operations. The team uses Programmable Logic Controllers and a complex communications network involving fiber-optic, radio airwave and copper media to integrate operations of the wastewater treatment plants, pump station and other elements of the CSO system.

Equity Impacts

BES is required by state and federal regulators to ensure the equitable distribution of its basic, sanitary and stormwater services that protect public health and the environment. Collection System Program facilities are equitably distributed across the City and the program provides equitable service levels to all communities.

Changes to Program

Collection System Program responsibilities are impacted by aging infrastructure and deferred maintenance and capital reinvestment, which can transfer an increased burden onto collection system operations.

In recent years, the program has increased already significant levels of condition assessment work to better understand the current state of assets (specifically, an increased focus on force mains and pump stations). This work continues via increases in FY 2019-20 to support condition assessment on Tier 1& 2 Force Mains. This inspection and assessment will provide the information needed to determine a long-term maintenance and/or replacement plan for these critical system assets.

Budgetary adjustments required in FY 2019-20 include adding two Industrial Maintenance Millwrights in the Pump Station Operations & Maintenance work unit to support sustainable operations at the Bureau's 98 pump stations Citywide (including odor control facilities and other related infrastructure). Additionally, the FY 2019-20 Adopted Budget includes increases in funding for odor control and reliability assessment work at various pump stations Citywide.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	305,725	1,460,330	4,154,124	1,640,000
External Materials and Services	3,735,893	3,745,084	4,224,843	4,450,344
Internal Materials and Services	19,908,311	19,177,179	23,436,665	23,940,605
Personnel	3,735,019	4,071,605	4,132,944	4,435,625
Sum:	**27,684,948**	**28,454,199**	**35,948,576**	**34,466,574**
FTE	32.2	31.7	32.6	32.85

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses for this program include personnel, Capital Outlay for vehicles and equipment, external costs for pipe inspection services and condition assessment, odor control. Internal services include the PBOT Maintenance Operations interagency agreement and right of way and survey services.

Staffing: 36 positions support this program with approximately 3.15 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include CAD Technicians (3), a Coordinator I, Electricians (5), Engineers (8), Environmental Technicians (3), Industrial Maintenance Millwrights (13), an Instrument Technician, a Manager II, and a Supervisor II.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Maintenance

Program Description & Goals

The Maintenance Program (within the Wastewater Group) is responsible for (1) assessing the condition of more than 18,000 registered assets at the two large wastewater treatment plants, 98 pump stations and related facilities, and (2) planning their preventive, predictive and corrective maintenance needs. This program works toward ensuring the BES Strategic Goal of Service Delivery, to optimize how BES delivers sanitary and stormwater services, and protects and recovers resources for all Portlanders.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of wastewater processed annually (in million gallons)	36,242	28,901	29,400	29,400	0
Cost to operate and maintain the treatment plants per million gallons treated	$529	$677	$770	$900	0

Explanation of Services

The Maintenance Program ensures that assets are properly maintained, operate at required service levels, and minimize asset life-cycle costs while maintaining appropriate risk levels. The 2017 implementation of the Condition Assessment Program (CAP), a comprehensive utility asset management program, facilitates decision-making on the quality and quantity of infrastructure reinvestment that is needed to meet and sustain optimal levels of service at acceptable levels of system risk.

The Maintenance Program generates data using the CAP to make strategic reinvestment decisions by systematically decreasing unforeseen asset failures and reducing overall business risk exposure. CAP is a two-way conduit for communicating the condition of assets to field experts, engineers and decision makers. It tracks the condition of more than 18,000 registered assets at two large wastewater treatment plants, 98 pump stations and appurtenances. A critical aspect of the program is that decisions are made on current information using a multi-level approach. CAP provides information that optimizes maintenance and operation strategies and supports reliability-centered operations and maintenance practices and goals.

The Maintenance Program Manager also directs and supervises the work of the maintenance teams that maintain the collection system and treatment plant facilities.

Equity Impacts

BES is required by state and federal regulators to ensure the equitable distribution of its basic, sanitary and stormwater services that protect public health and the environment. The Maintenance Program delivers maintenance to the treatment plant and pump station facilities located in all areas of the City. All facilities are assessed and maintained according to the same criteria and standards, which benefit all communities.

Changes to Program

Maintenance Program responsibilities are impacted by aging infrastructure and deferred maintenance and capital reinvestment, which can transfer an increased burden onto collection system operations and maintenance obligations. Recent trends have increased the need for condition assessments, improved asset inventory management and updates to maintenance procedures. Development of the Maintenance Program CAP began in summer 2017 with implementation of Level 1 assessment services for treatment plants, and with assessment of pump stations beginning in October 2018.

The primary budgetary change for the Maintenance Program in FY 2019-20 is increasing consultant services to support condition assessment by $150,000 ongoing. This will provide for technical analyses that are typically beyond the expertise of internal staff.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	230	73,733	594,853	403,200
Internal Materials and Services	324	0	0	0
Personnel	46,154	835,684	659,160	672,379
Sum:	**46,708**	**909,417**	**1,254,013**	**1,075,579**
FTE	0	3	4	4

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses supporting this program include personnel and external services for condition assessment consultant services.

The FY 2018-19 Revised Budget for this program reflects approximately $340K carryover from the prior year for digester gas piping condition assessment.

Staffing: 4 positions support this program. Positions include a Manager II, a Coordinator I, an Engineer II, and an Engineering Technician II.

The increase in FTE for FY 2019-20 reflects a correction for a previously approved condition assessment position that was incorrectly allocated to the Watershed Revegetation Program.

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Treatment

Program Description & Goals

The Treatment Program (within the Wastewater Group) manages the operation and maintenance of two wastewater treatment plants that treat collected wastewater/stormwater from the City of Portland service area. The Columbia Boulevard Wastewater Treatment Plant (CBWTP) treats both combined and separated sewers with an annual daily average of 76 million gallons per day of municipal wastewater. The Tryon Creek Wastewater Treatment Plant (TCWTP) treats combined sewer flow with an annual daily average of 6.5 million gallons per day. The treatment process at each of the two treatment plants surpasses the performance measure required in the City's National Pollutant Discharge Elimination System permits.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of wastewater processed annually (in million gallons)	36,242	28,901	29,400	29,400	0
Percentage of biochemical oxygen demand removed	96%	96%	85%	85%	0

Explanation of Services

The Treatment Program plans, manages and performs the operations and maintenance of Portland's two large sewage treatment facilities (CBWTP and TCWTP), the combined sewer overflow (CSO) reduction system, the resource recovery systems and beneficial reuse or disposal of biosolids and stormwater residuals.

Operating sewage and stormwater treatment facilities is highly technical work performed in a stringent regulatory environment. Operations requires 24/7 staffing and monitoring, with the ability to quickly adjust staffing levels and treatment processes in response to dramatic changes in weather conditions and flows. Staff routinely monitor treatment process at both CBWTP and TCWTP, respond to changing conditions, troubleshoot issues, and make real-time adjustments to ensure that regulatory requirements are met. Effective treatment involves coordinated efforts regarding the processing of both solids and liquids.

Maintenance Planning plans, schedules and coordinates the material, equipment and personnel required to implement maintenance projects at the treatment plants. Staff are responsible for project scoping and management, managing vendor/contractor service contracts and ensuring that projects meet standards. They also serve as project managers on small- to medium-sized capital improvement projects at the treatment plants.

Process Control provides the strategy, development and procedures for operating both treatment plants. This involves providing general and specific technical support to management and staff, as well as the many other stakeholders who regularly interface with Operations. In addition, Portland's completed CSO reduction system is operated through integrating the operations of the CSO system, the collection system and the treatment system. This strategy is guided by nine prioritized operating objectives that seek to first protect the wastewater treatment system, protect public health from sewage releases and then minimize CSO discharges.

The City of Portland produces approximately 15,000 dry tons (˜ 75,000 wet tons) of biosolids per year at the CBWTP. Biosolids are the nutrient-rich by-product of municipal wastewater treatment. The City treats raw sewage solids (often called sludge) to meet stringent EPA standards for pathogen reduction, vector attraction reduction and pollutant levels before they can be classified as

pathogen reduction, vector attraction reduction and pollutant levels before they can be classified as biosolids and used beneficially. Further, the biosolids must meet additional DEQ regulatory requirements, which are included in the City's Biosolids Management Plan and National Pollutant Discharge Elimination System permit.

Disposal of wastewater and stormwater collection and treatment residuals is another critical aspect of the Treatment Program. Stormwater residuals are delivered from around the City, and inorganic residuals are collected at treatment plants. This generates thousands of tons of material that is managed and disposed of and/or reused in the best manner. Grit & Screenings and Sanitary Collections System residuals are currently hauled and disposed of under BES contracts at the Wasco County Landfill. Additionally, City of Portland stormwater residuals from sedimentation sumps, catch basins, ditches, culverts and other stormwater facilities are beneficially reused as daily cover at the Wasco County Landfill. Conducting this program efficiently and effectively requires continuous compliance monitoring and reporting, diligent oversight of onsite services and offsite programs (e.g., land application) and management of several contracts for hauling, disposal and beneficial reuse.

The Treatment Program also manages maintenance of the treatment facilities and related systems, via specialized work units that include the following services:

• Mechanical Maintenance installs, maintains, troubleshoots and repairs the facilities and mechanical equipment at the City's wastewater treatment plants.

• Electrical and Instrumentation installs, maintains, troubleshoots and repairs a variety of electrical equipment and instruments at the City's wastewater treatment plants and pump stations.

• Industrial Coatings provides corrosion/weathering protection of exposed surfaces and applies industrial labelling for proper identification of piping/equipment and the warning and/or elimination of hazardous conditions.

• The Automation Support Team (allocated between both the Treatment Program and the Collection System Program) develops strategies for automating hardware and software to improve the efficiency of collection and treatment facility operations. The team uses Programmable Logic Controllers and a complex communications network involving fiber-optic, radio airwave and copper media to integrate operations of the wastewater treatment plants, pump station and other elements of the CSO system.

Equity Impacts

BES is required by state and federal regulators to ensure the equitable distribution of its basic, sanitary and stormwater services that protect public health and the environment. Treatment services are provided equitably to all ratepayers throughout the City.

The Columbia Boulevard Wastewater Treatment Plant Citizens Advisory Committee represents a variety of neighborhood, business, industry, environmental, recreational, educational and other interests. It is a community sounding board that reviews and provides advice to CBWTP to ensure that the plant is operated in accordance with the vision of the community.

Changes to Program

As the treatment plants continue to age, there have more frequent failures of equipment. In recent years, the Treatment Program has supported increased condition assessment work. Better understanding the condition of all assets at the treatment plants will help prioritize and properly sequence the specific work and inform reinvestment needs.

The City of Lake Oswego has asked that capital projects at TCWTP be delayed in order to explore the potential to build a new treatment plant at a different location nearby. However, there is a driving need to assess immediate, critical needs at TCWTP and implement projects to keep the plant functioning properly to meet regulatory requirements.

In July 2018, CBWTP began a massive two-year effort to reduce the solids inventory at the solids lagoon (a portion of the lagoon is unusable because of construction, and the remaining operating cells are overloaded). Although this effort is ongoing, options for managing incoming solids will be evaluated so that a plan can be developed for keeping up with incoming solids until the secondary process improvements project provides new solids handling process equipment. The Bureau received $3.5 million in ongoing budgetary resources in the FY 2018-19 Fall budget monitoring process (BMP) to support the Biosolids Inventory Reduction Project. Additional budgetary adjustments of approximately $150,000 are included in FY 2019-20 to accommodate increases in the costs of the pre-existing biosolids hauling contracts as a result of inflationary and fuel increases.

The Renewable Compressed Natural Gas (RCNG) facility is scheduled to be completed in summer 2019 and will allow the conversion of waste to produce biogas for sale directly to NW Natural. Although the biogas reuse project will add assets to CBWTP that will require operation and maintenance, an operational facility will also generate revenue for the Bureau. In addition to approximately $320,000 in annual ongoing O&M expense related to RCNG operations, the FY 2019-20 Adopted Budget adds a new FTE to manage, coordinate, measure, track and optimize the delivery and sale of biogas and maximize potential for revenue generation. This project is anticipated to generate a minimum of $3 million dollars in annual revenue, with the potential for a much higher amount if market conditions align.

Two additional new FTEs are necessary to be added to this program in FY 2019-20. The first is an Automation Support Team Supervisor who will (1) better address the extreme span of control issues faced by the current Electrical and Instrumentation Supervisor (who currently supervises 27 employees), and (2) better manage the increased complexity of the automation systems and the speed of technological changes. In addition to supervising a staff of eight programmers, initial priorities will include determining a replacement cycle/reinvestment plan for automation equipment, evaluating the reliability and security of the automation systems, coordinating with Engineering to ensure that automation projects are delivered efficiently and working with Operations and Engineering to make process changes to existing systems to improve quality and process control. The second position is a budgetary addition of $76,709 ongoing to make permanent a Wastewater Operator trainee position that currently is being funded as a double-fill. This has been a very successful approach to providing training and promotional opportunities, improve work force succession, rapidly improve operator qualifications and experience and advance equity outcomes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	157,822	48,478	410,500	81,500
External Materials and Services	7,625,545	7,444,034	16,232,798	14,412,930
Internal Materials and Services	981,889	1,016,184	1,154,551	1,026,764
Personnel	10,535,543	10,683,141	10,876,885	11,920,675
Sum:	**19,300,799**	**19,191,836**	**28,674,734**	**27,441,869**
FTE	94.75	92.25	97.75	94.7

Resources: Resources for this program come from ratepayer fees and charges for sewer and stormwater services.

Expenses: Primary expenses supporting this program include personnel and external costs for biosolids land application and transportation, digester cleaning services, electricity, odor control, waste disposal, repair and maintenance supplies, treatment chemicals, and other operating supplies and expenses. Internal expenses include Field Operations and laboratory services for Lagoon monitoring.

Staffing: 102 positions support this program with approximately 8.3 FTE allocated to the Capital Program Management and Controls Program for capital improvement projects. Positions include Analysts (2), an Equipment Operator II, Coordinators (4), Electricians (8), Engineers (2), and Industrial Machinist, Industrial Maintenance Millwrights (19), an Industrial Painter, Instrument Technicians (11), a Manager II, Supervisors (7), Wastewater Operations Specialists (4), and Wastewater Operators (41).

Assets and Liabilities: This program supports Bureau-wide assets of $13.5 billion.

Program Information

Bureau: Bureau of Environmental Services

Website: https://www.portlandoregon.gov/bes/

Program Contact: Ken Bartocci

Contact Phone (503) 823-6022

Bureau Support

Program Description & Goals

The Bureau Support Program encompasses work across all sections of the Water Bureau. The program meets administrative, financial, communications, and equity needs.

The program includes promoting equity across all bureau programs and services; engaging the public in bureau work; making sure ratepayer money is used appropriately; and making sure the bureau works as efficiently as possible and is accountable to the public.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

• Support for bureau-wide work: This program includes contract administration and facilities work, as well as administrative expenses such as rent, utilities, postage, operating supplies, and the Utility License Fee.

• Accounting: Staff in this program manage the bureau's finances, including managing its accounting, and ensuring that funds are spent as designated.

• Communications: Communications staff coordinate outreach and engagement work, including social media, communication about construction projects, media and public records requests, and emergency communications.
• Equity: Like other City bureaus, the Water Bureau is implementing a five-year Racial Equity Plan. The plan focuses on improving outcomes for communities of color and removing internal and external barriers to equitable work.
• Program planning and performance management: This program includes the time managers and supervisors spend planning programs and evaluating performance.
• Interagency work: This program includes support from other City of Portland agencies, such as the Bureau of Technology Services, the City Attorney, and the Office of Management and Finance.
• Advisory groups: The Water Bureau works with two main utility advisory groups: the Portland Utility Board and the Citizens' Utility Board. Staff in this program work with these advisory groups.

• Managing and maintaining bureau-owned property: The bureau owns 175 properties, including around its reservoirs, tanks, and pump stations. This program has included the Mount Tabor Preservation Project, which is led by the Water Bureau but funded by the City's General Fund.

Equity Impacts

Bureau Support contains the bulk of the bureau's equity management. The program includes the Equity Manager position, who was hired in early 2019 and works toward embedding equity across all bureau programs and services. This program also includes the Communications group, which has had an equity focus in recent years.

Staff in this program help fulfill translation, interpretation, and accommodations requests, and have rolled out an equity lens for communications materials. This group is also focusing on attending more events for communities of color, working with media that support underserved communities, and holding outreach events at facilities with greater access for communities of color.

This year's budget changes have the potential to promote more equitable community engagement.

Changes to Program

This budget adds two limited-term positions to the Communications group; one is new, and the other is converted from part time to full time. This budget also adds $50,000 to help with Citywide website migration.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	200,812	-1,089,999	100,000	39,072,000
External Materials and Services	7,934,617	13,024,201	10,716,523	11,524,211
Internal Materials and Services	6,508,638	5,788,193	6,959,147	6,632,460
Personnel	6,971,034	6,566,497	7,247,755	8,213,385
Fund Expense				
Contingency	0	0	136,992,656	107,192,795
Debt Service	152,943,666	59,322,067	61,929,077	66,796,068
Debt Service Reserves	0	0	36,218,013	39,943,010
Fund Transfers - Expense	156,355,890	184,516,609	229,840,447	301,267,268
Ending Fund Balance	246,662,610	229,469,254	92,983,350	21,192,697
Sum:	**577,577,267**	**497,596,822**	**582,986,968**	**601,833,894**
FTE	98.85	109.28	120.6	120

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $65.1 million and includes the Portland Building Restoration project. The capital budget totals $0.3 million. The operating budget's main expenses are staffing, supplies, the Utility License Fee, facilities, communications, technology support, and insurance.

Staffing: Positions that support this program include administrative specialists, accountants, and communications staff, among others.

Assets and Liabilities: The bureau owns 175 properties, including a share of the Portland Building. The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Data Management

Program Description & Goals

The Data Management Program is responsible for managing information about water system infrastructure. This includes 748 quarter-section maps of water facilities; project plans and reports; water use data; conditions of facilities, infrastructure, and equipment; and records of customer interactions. The Water Bureau uses multiple data management systems, including Records Management, Geographic Information System (GIS) mapping, Computer-Aided Design and Drafting (CADD), and Computerized Maintenance Management System (CMMS). Data from these systems are used to evaluate and monitor the condition and performance of assets, help make decisions about investment strategies, and improve business processes and customer services.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Activities include developing, operating, and maintaining data management systems that directly support effective and efficient daily field operations and management of the water system. This program includes maintaining and updating quarter-section maps in GIS; maintaining and reporting from the bureau's maintenance management and project management systems; and maintaining a database for capital improvement projects to monitor planning, design, and construction for status, scope, schedule, and budget. The program also includes the maintenance of a management system for construction contract administration.

Equity Impacts

This program manages asset, customer interaction, and internal process information. As the bureau embeds equity in all programs and processes, staff in this program will have the opportunity to create equity lenses for the information they manage.

Staff in this program do not work directly with the public and do not receive requests for accommodations.

Changes to Program

No program changes are planned for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	366,201	99,324	13,900	13,900
Internal Materials and Services	906,548	929,558	1,049,284	1,099,275
Personnel	2,327,075	2,332,145	2,759,614	2,905,620
Sum:	**3,599,824**	**3,361,027**	**3,822,798**	**4,018,795**
FTE	18	18	18	18

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $4 million. The operating budget's main expenses are staffing and application maintenance.

Staffing: Positions that support include GIS (Geographic Information System) technicians, data analysts, and engineers, among others.

Assets and Liabilities: Assets within this program include data management systems and 748 quarter-section maps of water facilities.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Employee Investment

Program Description & Goals

The State of Oregon requires employees engaged in the operation of the water system for both distribution and treatment (nearly 200 employees in the Water Bureau) to be certified by the Oregon Health Authority. Certified employees are required to complete regular continuing education to maintain those certifications. Water Bureau engineers and electricians also must be licensed and complete ongoing education to maintain their certifications. Employees who operate specialty equipment, such as cranes, also require state and national certifications.

The Water Bureau operates two unique apprenticeship programs sanctioned by the Bureau of Labor and Industries. Many field employees are required to obtain and maintain a Commercial Driver's License, following federal Department of Transportation requirements.

The City requires a variety of mandatory trainings, such as defensive driving, Equity 101, HR Administrative Rule 2.02 training, emergency management trainings, and the Occupational Safety and Health Administration requires safety-sensitive trainings for Work Zone Traffic Control, Confined Space Entry, Rigging and Slings, Excavation Safety, Hazardous Chemicals, and Asbestos Handling, among many other trainings provided by the Water Bureau. Finally, the Water Bureau augments required certifications with training that supports employee development.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Program activities include providing employee training; tracking, monitoring, and ensuring all required certifications and licenses are maintained; and making sure all City-required training requirements are met. The program also includes administering and evaluating the ongoing apprenticeship programs. Activities also include managing workplace safety program for high-hazard environments, such as electrical arc-flash, confined spaces, and fall hazards.

Staff in this program also create employee enrichment programs and equity-focused trainings designed to instill an equity mindset in all bureau staff.

Equity Impacts

This program includes the bureau's Training and Development Officer, who has an equity focus in employee enrichment and programming. Among other programs, the Training and Development Officer runs a job shadow program and informal lunchtime sessions that address issues of race, gender, and age in the workplace.

Staff in this program do not work directly with the public and do not receive accommodation requests from the public. The bureau does not currently track employees' requests for accommodations.

Changes to Program

There are no budget changes for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	317,932	440,077	733,103	730,533
Internal Materials and Services	9,891	12,716	122,498	110,956
Personnel	1,661,774	2,138,827	2,051,079	2,424,947
Sum:	**1,989,597**	**2,591,620**	**2,906,680**	**3,266,436**
FTE	40	30		

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $3.3 million. The operating budget's main expenses are staffing, training, certifications, and vehicle fleet.

Staffing: Positions that support this program include risk specialists, water operations mechanics, and automotive and construction equipment operators, among others.

Assets and Liabilities: This program does not contain assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Planning

Program Description & Goals

The Planning Program includes short- and long-term strategic planning and direction; regional water providers coordination on water supply planning; financial planning; capital improvement development; infrastructure planning, including asset management; summer supply planning; and wholesale customer coordination.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Maintain water revenue bond AAA credit rating	100%	100%	100%	100%	100%
Debt service coverage at 1.90 on first lien bonds	3.02	3.22	1.90	1.90	1.90
Debt service coverage at 1.75 on both first and second lien bonds	1.91	1.99	1.75	1.75	1.75

Explanation of Services

• Asset management: Staff in this program assess water system asset conditions, risks of failure, and risk mitigation strategies, and document alternatives and recommended solutions for maintenance and replacement of supply and distribution infrastructure.

• Capital Improvement Program (CIP) planning: This program develops and administers a multi-year capital improvement program to address system needs, manage spending, and meet financial bond requirements.

• Budget and financial planning: Staff in this program develop and monitor the bureau's budget and adhere to prudent financial practices, enabling ongoing cost-effective access to bond financing for capital improvements, and ensures that water rates are at a good value and fair price to finance system operation and improvement.

• Climate change planning: The bureau's climate change expert works to build resilience to climate-related risks through risk assessment, analysis, and adaptation strategies.

• Summer supply planning: Many bureau staff work together, and with wholesale customers, to ensure reliable summer season water supply.

• Strategic planning: The bureau's Strategic Business Plan aims to maintain continuous organizational improvement through strategic planning, risk identification, and implementation of management strategies.

• Participation in the Regional Water Providers Consortium: The Water Bureau works with the Consortium to maintain cooperative relationships with regional water providers to plan for long-term supply, implement regional water conservation programs, and build emergency preparedness and response capability.

• Water rights: Staff in this program manage and maintain water rights and water rights permits.

Equity Impacts

The Planning program recognizes equity impacts in many areas:

• Asset management works to prevent deferred maintenance that could burden future generations.

• The bureau recognizes that climate impacts to the water system could disproportionately affect vulnerable populations, and is assessing how to incorporate equity into its climate change planning efforts.

• The bureau's strategic plan development has centered equity throughout its process, identifying both equity-focused issues within the bureau and equity impacts of every potential plan strategy. The strategic planning process has encouraged and enabled bureau staff and leadership to talk meaningfully about how equity fits in with all bureau work.

This budget change does not have clear equity impacts.

Changes to Program

This budget adds $200,000 for consultant services to help with wholesale contract review.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	-2,359,538	-2,588,536	0	0
External Materials and Services	925,764	1,303,647	1,588,205	1,825,431
Internal Materials and Services	-14,033,750	-15,103,861	396,493	277,348
Personnel	4,091,100	4,057,811	4,994,684	5,551,428
Fund Expense				
Debt Service	200	0	600,080	0
Fund Transfers - Expense	9,655,227	0	0	0
Sum:	**-1,720,997**	**-12,330,939**	**7,579,462**	**7,654,207**
FTE	24.5	25.9	21.5	21.5

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $4.6 million and $3.1 million for planning studies. The operating budget's main expenses are staffing, consultant services, Portland Utility Board support, and debt management.

Staffing: Positions in this program include engineers, analysts, and financial analysts, among others.

Assets and Liabilities: This program does not contain assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Water Efficiency

Program Description & Goals

The Water Efficiency program contains the Water Bureau's efforts to sustain long-term availability of water resources through efficient water use by the bureau and the communities it serves. Program efforts are focused on demonstrating efficient use of state-regulated water resources to ensure ongoing long-term access to undeveloped water rights, encouraging and supporting efficient water use by customers (including focused efforts to assist low-income and small business customers in reducing water costs through efficiency), and systematic assessment and improvement of water system loss and leakage rates.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

• Promoting efficiency in the community: Staff members in this program support community members by distributing water efficiency devices, rebates, and information. The program focuses on helping low-income and commercial customers control their water use.

• Reducing water loss: All water systems lose some water to leaks. Water Efficiency program staff are currently planning and implementing a water loss control plan for Portland's system.

• Complying with state and City requirements: This group manages efficiency-related compliance with the bureau's state-mandated Water Management and Conservation Plan and the City's water sustainability goals.

Equity Impacts

This group attends many community events, prioritizing those that engage communities of color. Staff in this group are working to reduce barriers to program access, including to the fixture repair and replacement program. Staff prioritize school programs for schools with Title 1 status.

This program routinely translates materials into Spanish, Vietnamese, and Chinese. When staff in this group attend events, they often employ Community Engagement Liaisons for engagement and language interpretation.

There are no changes to this budget, and there are no clear equity implications to the unchanged budget.

Changes to Program

There are no changes to this budget.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	138,209	168,886	311,300	222,300
Internal Materials and Services	42,568	51,276	41,300	41,939
Personnel	442,892	446,792	590,246	695,190
Sum:	**623,669**	**666,954**	**942,846**	**959,429**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $1.0 million. The operating budget's main expenses are staffing, parts, and fleet vehicles.

Staffing: Positions that support this program may include engineers and program coordinators, among others.

Assets and Liabilities: This program does not contain assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Customer Service

Program Description & Goals

This program is responsible for utility sales operations from the meter to the collection of cash for the Water Bureau and Bureau of Environmental Services (BES). This includes meter reading, managing account and customer data, and billing, collection, and payment processing of 192,000 water, sewer, and stormwater accounts billed monthly, bi-monthly, or quarterly. This program includes providing financial assistance to qualifying low-income customers.

This program also supports development by performing reviews of water-related building permit application intakes, reviews, and purchases. All developments are reviewed to ensure that they comply with standards for water service.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of calls answered within 60 seconds	51%	83%	80%	80%	100%

Explanation of Services

Each working day, Customer Service staff answer more than 750 customer calls and field 75 online inquiries about customer accounts and other bureau work. The program also assists 75 walk-in customers each day with their payments and/or water service, and administers the Financial Assistance Program, including a bill discount for 6,750 enrolled participants.

This program includes the team that manages the Customer Information System, which is used to bill for sewer, stormwater, and water services; collect money from customers; and assist customers with account inquiries.

The Customer Service Program processes about 2,280 water permits annually for commercial and residential developments. The activities cover land use reviews, development reviews, sale of new domestic services, fire services, and petition mains needed to support new construction by private parties seeking water service.

Equity Impacts

Staff in the Customer Service program work directly with community members and have made major changes in recent years to do this work more equitably.

The Bureau's Financial Assistance Program has recently expanded and now offers more help to more people. Staff members working in this program have studied participant demographics and are working to increase program representation among traditionally underserved communities.

Staff in this program regularly use interpretation services, and program managers aim to increase the number of staff who fluently speak multiple languages. Some phone services and brochures are available in multiple languages. For people with disabilities, staff in this program can enlarge bills, convert bills to braille, and communicate via writing.

This year's budget changes are unlikely to have equity impacts.

Changes to Program

The Water Bureau installed a Customer Self-Service (CSS) portal that allows customers to request move-ins and move-outs, payment arrangements, and address changes online. This has helped reduce call volume, allowing for two Customer Services Representative positions to be reallocated to the Meters Program. In addition, two limited-term Customer Services Representative positions will be eliminated.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	569	324,628	0	0
External Materials and Services	2,071,043	2,306,703	4,278,673	5,083,015
Internal Materials and Services	4,954,513	6,064,797	4,296,097	3,768,945
Personnel	8,351,192	8,412,252	10,873,547	11,416,366
Sum:	**15,377,317**	**17,108,380**	**19,448,317**	**20,268,326**
FTE	93	98	103	104

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $20.3 million. Main operating costs include bill generation (reading meters, printing, and mailing), payment processing (bank fees and payment vendor fees), and the Financial Assistance Program (discounted bills, money sent to Home Forward, and management of the program).

Staffing: Positions that support this program include customer accounts specialists, business analysts (who support the billing system), meter readers, water service inspectors, and engineering technicians, among others.

Assets and Liabilities: The major asset of the Customer Service group is the Cayenta billing system.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau
Website:
Program Contact: Tony Andersen
Contact Phone 503-823-8653

Grounds

Program Description & Goals

The Water Bureau portfolio includes more than 175 properties. These properties include HydroParks, pump stations, tank sites, reservoir sites, and conduit sites, among others. This program maintains the grounds and landscaping around these assets. The activities of this program make it possible for bureau staff to safely access Water Bureau facilities and for community members to use bureau properties that are open to the public.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The bureau maintains grounds and landscaping in and around water facilities to meet Water Bureau and community expectations. Staff in this program manage visitor and grounds facilities at Powell Butte, where the Water Bureau has two large reservoirs.

Equity Impacts

Grounds work occurs all over the city. One of the goals of the HydroParks program was to open public space in areas underserved by neighborhood parks. The bureau could start to examine the equity impacts of the Grounds program by overlaying work areas with demographic data.

Changes to Program

There are no budget changes for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	177,330	184,915	225,100	222,100
Internal Materials and Services	305,894	363,856	248,468	255,754
Personnel	361,244	396,987	285,559	338,095
Sum:	**844,468**	**945,759**	**759,127**	**815,949**
FTE	9	9	9	9

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $0.8 million. The operating budget's main expenses are staffing, supplies, and fleet vehicles.

Staffing: Positions that support this program include a maintenance supervisor, a parks technician, and a horticulturist.

Assets and Liabilities: Assets in this program include the bureau's 175 properties. The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Security/Emergency Management

Program Description & Goals

The Security/Emergency Management Program includes protecting and safeguarding the water system and preparing for and responding to systemwide emergencies. This program provides comprehensive Emergency Management plans to prevent, mitigate, respond to, and recover from the potential effects of all types of disasters. This includes providing preparedness information and creating and implementing training and simulation exercises.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Security includes Bull Run Watershed surveillance and in-town field monitoring of pump stations, tanks, the Interstate buildings, and other facilities. Security also provides continuous dispatch and video surveillance of numerous locations, and serves as first responder to intrusions and water emergencies.

Emergency Management activities include operating the bureau's Emergency Operations Center in a state of readiness; coordinating with Portland Bureau of Emergency Management (PBEM), Oregon Emergency Management (OEM), and the Federal Emergency Management Agency (FEMA); facilitating, planning, and coordinating emergency management trainings and exercises; updating bureau emergency management plans; and developing and maintaining continuity plans.

Equity Impacts

A natural disaster that disrupts water service could have disproportionate impacts on communities of color and people from immigrant communities, and the bureau's Emergency Management group prepares for this potential.

The bureau has created preparedness videos and other materials in multiple languages.

This year's budget change has no clear equity impact.

Changes to Program

This budget adds one limited-term security position for the Interstate facility.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	0
External Materials and Services	231,479	174,124	293,338	291,338
Internal Materials and Services	785,722	565,760	571,496	648,677
Personnel	1,500,153	1,611,971	1,583,158	1,819,568
Sum:	**2,517,354**	**2,351,855**	**2,447,992**	**2,759,583**

	FTE	13	13	14	14

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $2.7 million and the capital budget totals $0.1 million. The operating budget's main expenses are staffing, supplies, communications, and fleet vehicles. Capital expenses include replacement of surveillance equipment.

Staffing: Positions that support this program include water security specialists and program coordinators, among others.

Assets and Liabilities: Assets in this program include the Emergency Operations Center and surveillance equipment at bureau-owned facilities.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Distribution Mains

Program Description & Goals

About 2,260 miles of distribution and distribution-transport main (pipe) transport drinking water from terminal reservoirs through mains to local storage, and then through mains to hydrants and services. Portland's water system includes active mains that were installed as early as 1894. Pipe sizes in the distribution system range from 1.5 inches to 36 inches in diameter. Distribution system mains include a variety of material types, such as cast iron, steel, and ductile iron. This program ensures the continuity of drinking water, minimizes potential damage to public and private property, ensures fire suppression capabilities, minimizes water loss, and ensures compliance with water quality regulations.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program includes capital infrastructure planning, design, installation, operations, maintenance, and repair of distribution system mains and appurtenances, including leak locates and mains flushing. Design and replacement of aging cast iron and steel distribution mains (constructed by both city crews and private contractors) are the core investments of the program, while main repair, leak locating, and flushing support maintenance of the existing system. In addition, this program manages the design and installation or relocation of water mains to support interagency projects (such as light rail tracks). The bureau installs approximately 30,000 feet of main each year and repairs an average of 200 main breaks each year. The 30,000 feet of main installation includes a significant allocation of resources to support interagency and development work.

Equity Impacts

The Water Bureau has data about the condition of mains in the city; it has not overlaid this information onto demographic data that could suggest whether main condition varies by community.

Staff in this program have access to interpretation services.

Changes to Program

There are no budget changes for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	3,297,528	2,824,167	8,283,487	49,597,800
External Materials and Services	2,722,739	2,408,557	2,880,662	3,820,248
Internal Materials and Services	7,098,849	7,634,144	3,151,824	3,063,756
Personnel	6,848,371	7,277,122	11,322,199	12,116,025
Ending Fund Balance	-695,917	-664,428	0	
Sum:	**19,271,570**	**19,479,562**	**25,638,172**	**68,597,829**

	FTE	13	11	11	11

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $6.1 million and the capital budget totals $62.5 million. The operating budget's main expenses are staffing, pipes and fittings, and vehicle fleet. Major capital projects include Willamette River Crossing, ongoing replacements of mains, and mains projects in support of the Bureau of Environmental Services and the Portland Bureau of Transportation.

Staffing: Positions that support this program include automotive and construction equipment operators, water operations mechanics, utility workers, and utility locators, among others.

Assets and Liabilities: This program's assets are the bureau's 2,260 miles of distribution mains. The replacement value of mains total $3.2 billion. About 88% are in very good or good condition, 10% are in fair condition, and 2% are in poor or very poor condition.

The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Fountains

Program Description & Goals

The Water Bureau owns 129 drinking fountains, primarily four-bowl Benson Bubblers, throughout the city. This program includes operation, maintenance, cleaning, repair, and replacement of those drinking fountains. The first Benson Bubblers date from 1912.
This program also includes work by Portland Parks & Recreation to operate and maintain decorative (landscape feature) fountains.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Water Bureau crews clean each drinking fountain every two weeks. Staff in this program maintain, inspect, repair, and replace the fountains as necessary.

Equity Impacts

Drinking fountains and decorative fountains mainly serve downtown Portland.

Staff in this program who work with the public have access to interpretation services.

Changes to Program

There are no budget changes for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,644	2,600	2,500	102,500
Internal Materials and Services	6,043	5,587	637,191	638,111
Personnel	58,304	76,099	88,163	97,122
Sum:	**67,991**	**84,286**	**727,854**	**837,733**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $0.7 million and the capital budget totals $0.1 million. The operating budget's main expenses are staffing, supplies, vehicle fleet, and operation and maintenance of decorative fountains. Capital costs include major rehabilitation of both types of fountains.

Staffing: Positions that support this program include utility workers and parks technicians.

Assets and Liabilities: This program's assets are the city's 129 drinking fountains and 19 decorative fountains. The replacement value of the drinking fountains totals $2.0 million. Of these, 50% are in very good or good condition, 45% are in fair condition, and 5% are in poor condition. The replacement value of the decorative fountains totals $22.4 million. Of these, 80% are in very good, good, or fair condition and 20% are in poor or very poor condition.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Field Support

Program Description & Goals

Field Support is a broad group of support functions that enable field crews to complete system maintenance. This program includes the bureau staff who manage work flow, scheduling, and data through the bureau's computerized maintenance management system (CMMS). This program also includes the bureau's inventory of materials and the staff who manage acquisition, storage, delivery, and contract management in support of field crews. Other functions in this program include utility location, maintenance engineering, surveying, geotechnical support, and management of the bureau's more than 450 vehicles.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program supports field crews by providing the tools, equipment, materials, and information necessary to complete system maintenance.

Equity Impacts

As the bureau embeds equity into asset management, staff in this program will have the opportunity to examine how they can support equitable approaches to system maintenance.

Staff in this program who work with the public have access to interpretation services.

Changes to Program

There are no budget changes for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	2,064,805	3,683,776	3,830,000	4,174,550
External Materials and Services	1,270,862	1,618,991	1,241,401	1,086,401
Internal Materials and Services	-1,449,290	-1,108,068	-1,028,857	-797,246
Personnel	4,423,740	4,347,404	4,005,128	3,930,735
Sum:	**6,310,117**	**8,542,103**	**8,047,672**	**8,394,440**
FTE	120	129	117	117

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $4.1 million and the capital budget totals $4.3 million. The operating budget's main expenses are staffing, supplies, and fleet vehicle maintenance. Major capital expenses include replacement of fleet vehicles and equipment.

Staffing: 31.6 (FTE) operating positions support this program. These positions include maintenance supervisors, storekeepers, utility workers, and service dispatchers, among others.

Assets and Liabilities: This program's assets include the bureau's 450 vehicles. The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Hydrants

Program Description & Goals

The Water Bureau maintains 14,375 hydrants, some installed in the early 1900s, to provide fire suppression, flushing points for water quality, system maintenance, and alternative customer water sources. The Hydrants program ensures the constant availability of fire suppression supply throughout the city, providing essential support for life safety and minimizing damage caused by fire to property.

The provision of fire hydrants every 250 to 500 feet (depending on zoning) within the right of way, alongside redundant fire hydrant availability near key facilities such as hospitals and schools, ensures constant support of Portland Fire & Rescue's fire suppression efforts.

Hydrants enable crews and customers to access alternative sources of water, which may mitigate service outages or provide needed water supplies for functions like street sweeping, landscaping, and construction projects. In addition, hydrants provide key points for flushing the water system following the completion of maintenance tasks, and for maintaining water quality in areas of the system prone to water quality issues.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The activities of this program include installation, inspection, maintenance, repair, and replacement of hydrants, and maintaining the inventory of hydrants in CADD (Computer-Aided Design and Drafting) and records management systems.

Equity Impacts

City code regulates hydrant placement. The Water Bureau does not yet analyze data to see whether hydrant condition varies geographically.

Some staff in this program work in the field and occasionally talk with community members. They have access to interpretation services.

There are no likely equity impacts to the increase in this program's budget.

Changes to Program

The program budget has increased to reflect actual costs of hydrant replacement.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	1,102	191	0	0
External Materials and Services	784,399	872,407	821,830	655,490
Internal Materials and Services	1,281,354	1,353,061	365,035	540,776
Personnel	1,263,112	1,192,136	1,397,953	1,881,442
Sum:	**3,329,967**	**3,417,795**	**2,584,818**	**3,077,708**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $1.3 million and the capital budget totals $1.8 million. The operating budget's main expenses are staffing, hydrant parts, supplies, and vehicle fleet. The capital budget covers hydrant replacement.

Staffing: Positions that support this program include utility workers, automotive equipment operators, and water operations mechanics, among others.

Assets and Liabilities: The 14,375 hydrants have a replacement value of $231 million. Of these, 80% are in very good, good, or fair condition.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau
Website:
Program Contact: Tony Andersen
Contact Phone 503-823-8653

Meters

Program Description & Goals

Portland's distribution system includes 178,000 small meters and 9,000 large meters. Meters allow for accurate measurement of residential, commercial, and fire line water use, which allows for accurate billing. Water meters also enable customers to track their water use.

Inventory of all meter sizes is maintained by the meters program.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program includes capital infrastructure planning, installation, operations, maintenance, testing, and repair of both small and large meters. The Water Bureau uses a state-certified test bench, calibrated twice each year, to measure meter accuracy. Other water providers, private entities, and other bureaus can use the test bench as needed. All meters 1½ inches and larger are tested before being installed.

Small meters are often replaced when they are not measuring accurately or are highly used, as replacement is more cost effective than repair.

The bureau routinely tests large meters, given the high consequence of their failure. Meters for recording usage on wholesale customer accounts are tested twice each year, and meters for other users of large amounts of water are tested once each year. Additional testing on large meters is conducted based on the amount of water usage through the meter.

The program has installed and currently maintains about 2,000 automated metering devices, which allow meter readers to collect reads more efficiently and avoid dangerous reading situations.

Equity Impacts

The bureau continues to explore how automated metering infrastructure (sometimes called smart meters) could enable more equitable customer access to water use data.

Staff working in the field have access to interpretation services.

This year's budget changes have no clear equity impacts.

Changes to Program

Two Customer Service Representative positions will be reallocated from the Customer Service Program and reclassified as Water Meter Technician positions. These positions will perform meter repair and maintenance, backflow work, and other meter tasks.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	382,671	415,863	70,000	300,000
External Materials and Services	345,736	348,879	655,557	478,337
Internal Materials and Services	308,116	410,275	260,373	239,877
Personnel	1,382,724	1,530,216	1,776,707	2,004,187
Sum:	**2,419,247**	**2,705,233**	**2,762,637**	**3,022,401**
FTE	17	17	17	17

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $2.0 million and the capital budget totals $1.1 million. The operating budget's main expenses are staffing, meter parts, and vehicle fleet. The capital budget covers meter replacement.

Staffing: Positions that support this program include water meter technicians, water operations mechanics, and construction equipment operators, among others.

Assets and Liabilities: This program's major assets are the bureau's 178,000 small meters and 9,000 large meters. The total replacement value of meters is $110 million. About 77% of the meters are in very good, good, or fair condition.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Pump Stations/Tanks

Program Description & Goals

Portland's water distribution system includes 36 pump stations and 58 tanks. Most of Portland's water is delivered by gravity, and storage tanks both store water and help maintain system pressure. For parts of the city at higher elevations, the Water Bureau pumps water through pump mains to storage facilities at higher elevations.

Tanks provide needed storage for daily demand fluctuations and for short-term demand spikes such as fire flow. Pump stations and tanks are distributed throughout the system to lift water to higher elevations.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program includes capital infrastructure planning, design, construction, operation, maintenance, and repair of pump stations and tanks. Also included in this program are the operation, maintenance, and replacement requirements of the Supervisory Control and Data Acquisition (SCADA) system, which monitors, archives, and manages information about the water system.

This program includes the seismic upgrade and protection of pump stations and tanks, as well as regular cleaning that protects public health.

Equity Impacts

Tanks are critical for emergency water supply; natural disasters that cause water outages can have greater impacts on communities of color. Pump stations tend to benefit higher-elevation areas of the city, which have lower than average percentages of people of color and people with low English proficiency.

Staff in this program do not work directly with the public and do not receive requests for accommodations.

This year's budget change does not have any clear equity impacts.

Changes to Program

This budget adds one-time funding of $230,000 to disconnect Fulton Pump Station, now that the Hannah Mason Pump Station is complete.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	4,342,760	1,508,648	2,808,300	281,000
External Materials and Services	2,457,730	1,944,514	4,189,563	3,173,261
Internal Materials and Services	2,284,266	1,519,085	733,032	733,939
Personnel	5,085,810	4,872,893	4,927,483	5,295,131
Sum:	**14,170,566**	**9,845,141**	**12,658,378**	**9,483,331**
FTE	51.5	44.5	51.5	51.5

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $7.9 million and the capital budget totals $1.6 million. The operating budget's main expenses are staffing, utilities, repair and maintenance services, supplies, communication services, and vehicle fleet. The capital budget covers major maintenance of pump stations and tanks.

Staffing: Positions that support this program include engineers, operating engineers (staff who operate the water system in the field), and applications analysts (who run the SCADA system), among others.

Assets and Liabilities: This program's assets include 36 pump stations and 58 tanks, with a replacement value of $543 million. Of the assets, 77% are in very good or good condition and 20% are in fair condition.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau
Website:
Program Contact: Tony Andersen
Contact Phone 503-823-8653

Services

Program Description & Goals

Portland's water system includes about 179,000 domestic services, 1,700 irrigation services, and 3,900 fire lines, all of which transport water from the distribution or supply main to the customer's meter or private fire line connection. The provision of water is an essential need that is delivered by the Distribution Services Program, as no building without water may be occupied. Service lines connect the water system to homes, businesses, and institutions such as hospitals and schools. Many larger buildings require built-in fire suppression systems, which are served by larger-diameter fire services that protect life safety and property of high-intensity use structures.

Larger services include the installation of underground meter vaults in the right of way for ongoing access and maintenance of meters, which is particularly challenging in the utility-dense areas of the central city.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program includes capital infrastructure planning, design and construction, operations, maintenance, and repair of services from the distribution or supply main to the meter. This includes service installations, removals, repairs, and replacements. Maintenance of the system of services prevents leaks that can cause damage and waste water. Some of Portland's service lines are made of older copper, galvanized steel, or plastic, and these require replacement due to the high failure rate of those material types.

Asset Management analysis suggests that in the coming decades, the bureau will face increasing service failures as large sections of the system reach the end of their expected useful life. The bureau's goal is to strategically replace these service lines as soon as possible.

Equity Impacts

The Water Bureau has data about the condition of services in the city; it has not overlaid this information onto demographic data that could suggest whether service condition varies by community.

Staff in this program have access to interpretation services.

There are no changes to this budget, and there is no likely equity impact of the unchanged budget.

Changes to Program

There are no program changes planned for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	21,334	16,774	0	0
External Materials and Services	2,453,916	3,143,566	1,202,709	1,197,257
Internal Materials and Services	5,206,812	6,353,132	2,292,371	2,284,773
Personnel	4,030,209	4,603,611	4,859,371	5,362,183
Sum:	**11,712,271**	**14,117,083**	**8,354,451**	**8,844,213**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $2.4 million and the capital budget totals $6.4 million. The operating budget's main expenses are staffing, materials, and vehicle fleet. The capital budget covers service line installation and replacement.

Staffing: Positions that support this program include utility workers, mechanics, automotive and construction equipment operators, and surveyors, among others.

Assets and Liabilities: The 179,000 domestic services, 1,700 irrigation services, and 3,900 fire lines have a total replacement value of $1.2 billion. Of the assets, 91% are in very good, good, or fair condition.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau
Website:
Program Contact: Tony Andersen
Contact Phone 503-823-8653

Valves/Gates/Regulators

Program Description & Goals

The Water Bureau uses valves to isolate segments of the distribution system for maintenance; the availability of valves enables isolation of limited sections of the system to minimize the number of customers affected when isolation is necessary. Portland's water distribution system includes 1,800 large valves, 60,000 small valves, and 600 pressure-regulating valves.

Regulator valves allow the Water Bureau to maintain appropriate system pressure. Valves also perform a key safety function for crews by providing isolation that is a sufficient distance from where crews are working underground, protecting them from the potential force of water.

Large valves are critical to controlling the flow of water in large-diameter pipes, where breaks can generate significant damage to surrounding areas. Of the approximately 1,800 large valves in the system, approximately 1,200 are deemed critical because their failure could result in significant consequences (for example, critical valves include valves near hospitals).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program includes capital infrastructure planning, design, construction, operation, maintenance, and repair of system valves and pressure-regulating valves and stations. Maintenance of these valves is essential to ensure their proper operation. The bureau operates each of its critical 1,200 valves once every two years to make sure they are functional and do not seize up due to lack of use. Bureau staff also inspect and exercise valves at 75 critical crossings at least once every seven years and rebuild regulator valves on a seven- or ten-year cycle based on criticality.

Equity Impacts

The Water Bureau maintains data about valve condition; it does not currently overlay those data onto demographic data to understand whether valve condition correlates with demography.

Staff in this program have access to interpretation services.

There are no changes to this budget, and there is no likely equity impact of the unchanged budget.

Changes to Program

There are no program changes planned for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	286,793	380,260	408,300	400,300
Internal Materials and Services	161,098	167,969	228,711	228,074
Personnel	468,210	465,028	786,846	807,300
Sum:	**916,101**	**1,013,257**	**1,423,857**	**1,435,674**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $1.4 million. The operating budget's main expenses are staffing, repair and maintenance services, supplies, and vehicle fleet.

Staffing: Positions that support this program include utility workers, water operations mechanics, and construction equipment operators, among others.

Assets and Liabilities: Program assets include 1,800 large valves, 60,000 small valves (including regulator valves), and 600 pressure-regulating valves. The total replacement value of vales and regulators is $802 million. Of the assets, 81% are in very good or good condition, and 13% are in fair condition. The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Hydroelectric Power

Program Description & Goals

The Hydroelectric Power Program provides for administrative, operational, and regulatory oversight for the Portland Hydroelectric Project (PHP).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of power sold to Portland General Electric in megawatt hours	103,750	81,512	84,800	66,000	84,800

Explanation of Services

Program staff provide day-to-day oversight and coordination for the operation of PHP, which includes the control of the levels in the City's Bull Run reservoirs, the withdrawal of water from the reservoirs, and release of water downstream for compliance with in-stream regulatory targets. Staff also coordinate all issues associated with the operation of PHP; the sales of generated power from PHP to Portland General Electric; all state and federal dam safety requirements associated with PHP; the Vernon Station Hydroelectric Project; and the Washington Park and Mt. Tabor dams.

Equity Impacts

The Hydroelectric Power Program does not have any clear equity implications.

Staff in this program do not work with the public and do not receive requests for accommodations.

There are no changes to this budget, and there is no likely equity impact of the unchanged budget.

Changes to Program

No Program changes are planned for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	284,722	10,652,917	2,328,679	2,088,592
Internal Materials and Services	110,027	240,042	205,479	211,391
Personnel	347,540	306,848	355,780	367,694
Fund Expense				
Contingency	0	0	2,436,653	1,663,654
Debt Service	23,931	26,240	28,543	30,276
Fund Transfers - Expense	25,507	2,446,175	35,427	56,452
Ending Fund Balance	295,960	2,841,495	0	
Sum:	**1,087,687**	**16,513,717**	**5,390,561**	**4,418,059**

	FTE	2.25	2.25	2.25	2.25

Resources: Resources come from power sales to Portland General Electric. There are also interagency revenues for work performed by Hydroelectric staff for the Water Bureau, and interest earnings on cash balances.

Expenses: The operating budget is $2.7 million and includes, staffing, operations and maintenance, licenses and fees, and other miscellaneous costs associated with the Portland Hydroelectric Project.

Staffing: Positions that support this program include engineering staff.

Assets and Liabilities: The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Water Quality & Regulatory Compliance

Program Description & Goals

The Water Bureau's Water Quality and Regulatory Compliance Program encompasses the bureau's efforts to ensure ongoing compliance with public health and environmental requirements of state and federal laws, principally regulations issued under the federal Safe Drinking Water, Clean Water, and Endangered Species Acts. As a public drinking water utility, the bureau must meet or exceed state and federal regulatory requirements for water quality. The bureau must also ensure compliance with water quality and endangered species mitigation requirements throughout the drinking water system, most notably to address the impacts of the water supply system on federally listed anadromous fish species.

Relevant federal regulations include the Surface Water Treatment Rule, Stages 1 and 2 Disinfectants and Disinfection Byproducts Rules, Total Coliform Rule, Long Term 2 Enhanced Surface Water Treatment Rule, Lead and Copper Rule, Clean Water Act, and Endangered Species Act.

The bureau is also required to monitor water quality for a variety of regulated and unregulated contaminants and report results to the Oregon Health Authority and other agencies.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of violations of state and federal drinking water quality regulations	0	0	0	0	0
Number of violations of state and federal environmental regulations	0	0	0	0	0

Explanation of Services

This program includes water quality monitoring, reporting and management; communication and response to water quality complaints and questions; communications and administration of proper installation and function of backflow prevention devices; proper disposal of dechlorinated water; implementation of community lead hazard reduction programs; protection of aquatic habitat and sensitive fish species; management of temperature and flow in the lower Bull Run River; and conservation measures to support threatened and endangered species.

The goals of this program are to:

• Maintain water quality: Collect and test more than 11,000 water samples each year and ensure residents use backflow devices as needed to prevent contamination.

• Reduce exposure to lead: Work with community partners to reduce lead exposure from all sources and provide free lead testing.

• Meet Cryptosporidium requirements: The bureau is planning to build a filtration plant to remove Cryptosporidium (a microbe that can cause illness) from Bull Run water. Until the plant is built, the bureau continues to monitor Cryptosporidium.

• Meet environmental obligations: Continue to achieve and maintain the mitigation measures described in the Bull Run Watershed Habitat Conservation Plan to maintain the bureau's federally issued incidental take permit; mitigate the impacts of the drinking water supply system on anadromous fish species and contribute to salmonid restoration efforts throughout the Sandy River Basin.

• Evaluate future regulations: Review and evaluate potential and upcoming regulations that could affect water quality monitoring and operation of the water system.

Equity Impacts

Water quality issues have the potential to disproportionately affect people of color and people from immigrant communities, and water quality staff work to mitigate these potential impacts.

Staff in this program translate all critical public health materials into nine other languages. If a water quality notice needs to be issued to a specific area of the city, staff use census data to translate into the most relevant languages. Water quality information staff extensively use phone and in-person language interpretation for phone inquiries and at community events.

This year's budget changes have no clear equity impacts.

Changes to Program

The budget will increase by $91,000 for increased drinking water fees to the Oregon Health Authority and support for work related to the Habitat Conservation Plan.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	1,143,212	1,202,156	1,500,000	1,650,000
External Materials and Services	1,842,376	1,536,246	2,213,482	1,996,477
Internal Materials and Services	967,577	847,862	554,640	657,028
Personnel	4,790,758	4,933,188	6,347,104	6,592,606
Sum:	**8,743,923**	**8,519,452**	**10,615,226**	**10,896,111**

	FTE	61.75	63	66	67

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $8.9 million and the capital budget totals $2.0 million. The operating budget's main expenses are staffing, lab supplies, water analysis, lead kit supplies, a contract with Multnomah County for the Lead Hazard Reduction Program, and vehicle fleet. Major capital projects include Habitat Conservation Plan mitigation.

Staffing: Positions that support this program include lab specialists, environmental specialists, and water quality inspectors, among others.

Assets and Liabilities: This program does not contain assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Bull Run Watershed

Program Description & Goals

The Bull Run Watershed Program encompasses the efforts of the Water Bureau to protect and maintain the natural resources and infrastructure that enable Portland to use the federally designated Bull Run Watershed Management Unit (BRWMU) as the region's primary drinking water source.

The BRWMU is 147 square miles of densely forested land within the Mount Hood National Forest, closed to public entry, that contains the water supply infrastructure necessary to provide water to nearly one million Oregonians. Federal, state, and City laws regulate activity in the watershed; watershed protection dates from 1892.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of city's water supply provided by Bull Run watershed under normal operating conditions	92%	98%	95%	95%	100%

Explanation of Services

Program efforts are focused on:
•Infrastructure work: This program includes capital infrastructure planning, design, construction, operations, maintenance, repair, and rehabilitation of the water supply facilities and road system in the BRWMU.
• Collaboration with the U.S. Forest Service: 95% of the BRWMU is National Forest land. The City of Portland and the Forest Service work together to manage the watershed.
• Monitoring of water supply and weather conditions: Weather conditions affect water quality and supply. The Water Bureau closely monitors and responds to relevant conditions.
• Compliance with requirements: The Water Bureau complies with federal land management, historic properties, and cultural resources requirements.
• Providing appropriate public access: The Water Bureau leads supervised tours of the watershed for members of the public and other stakeholders.

Equity Impacts

The Bull Run Watershed program has equity impacts in three main areas:

• Protecting water quality: The Water Bureau recognizes that water quality problems could disproportionately affect communities of color and people with medical disabilities. Robust protection of water sources protects public health.
• Protecting cultural resources: The Bull Run Watershed program contains the bureau's cultural resource protection work in Bull Run. This program will include work with Native American tribes and communities.
• Education program: The bureau's education program offers free programs to qualifying groups. Transportation subsidies are available to reduce financial barriers for participating schools, with full transportation reimbursement options available to schools with Title 1 status. The education program meets accommodation requests, from wheelchair-accessible transit to translated materials. Staff offer programming in Spanish.

This year's budget changes are unlikely to have equity impacts.

Changes to Program

The program budget will increase for:

• $170,000 to perform scour analysis at Dam 1 and upgrade reporting tools used at Dam 1.
• $150,000 for right of way maintenance around power lines, focused on fire prevention, near the watershed dams.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	2,029,511	833,832	2,470,600	3,630,000
External Materials and Services	763,528	627,198	1,121,569	1,373,472
Internal Materials and Services	1,155,922	1,236,484	566,534	534,134
Personnel	2,493,561	2,543,012	2,582,226	2,696,445
Sum:	**6,442,522**	**5,240,526**	**6,740,929**	**8,234,051**
FTE	19	19	18	18

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $3.8 million and the capital budget totals $4.4 million. The operating budget's main expenses are staffing, repair and maintenance, and water supply monitoring conducted by the Water Bureau and the U.S. Geological Survey. Major capital projects include road maintenance and Dam 1 valve replacement.

Staffing: Positions that support this program include engineers, planners, and watershed maintenance staff, among others.

Assets and Liabilities: Major assets include two dams and reservoirs, a smaller dam and dike at Bull Run Lake, 164 miles of paved and gravel roads, water monitoring systems, and communication systems. The two major reservoirs store 16.9 billion gallons of water. The replacement value of Bull Run Watershed infrastructure totals $1.1 billion. 89% of the assets are in very good, good, or fair condition. The roads tend to be the assets in poor or very poor condition.
The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Groundwater

Program Description & Goals

The Groundwater Program contains the Water Bureau's efforts to protect and maintain the infrastructure and natural resources that enable Portland to reliably draw water from the Columbia South Shore Well Field (CSSWF) as a supplemental and emergency backup supply source. The City has supplied drinking water from the CSSWF since 1984. The well field is used as a supplemental supply during dry periods and as an emergency backup supply when the Bull Run supply is temporarily unavailable (due to major storms, wildfire, or landslides, for example).

Wells in the CSSWF draw from three regional aquifers along the south shore of the Columbia River in Portland, Fairview, and Gresham. The City has an Oregon Department of Environmental Quality-certified Wellhead Protection Program for the groundwater resource to prevent chemical spills that could seep into the ground and adversely affect groundwater quality.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Program efforts are focused on:
•Infrastructure: This program contains capital infrastructure planning, design, construction, operation, maintenance, repair, and rehabilitation of the water supply facilities within the CSSWF, including the system's production wells, monitoring wells, pumps, motors, well sites, collection mains, and pump station. • Maintenance of wells, pipes, pump station, and monitoring wells.
• Avoiding or minimizing groundwater contamination from human activities; identifying and managing naturally occurring groundwater contaminants.
• Monitoring aquifer resources and water quality conditions; performing spatial analysis of groundwater conditions and risks.
• Collaboration with area businesses to protect water quality and prevent contamination of groundwater resources.
• Administration of City code that regulates and requires inspections of chemical storage and drainage systems on public and private property. The Water Bureau works with Portland Fire & Rescue inspectors to make sure businesses comply with groundwater protection rules.
• Providing technical help for regulated businesses and educational events for the community.

Equity Impacts

Water quality problems can disproportionately affect communities of color and people with medical disabilities, and a major goal of the Groundwater program is to protect water quality. This program also includes a significant education component for business owners and residents in or near the well field. In recent years, program staff have worked to expand education outreach in communities of color.

The program's education events increasingly draw more diverse participants. Staff have created translated event materials and employ event staff who speak Spanish, Russian, and Vietnamese.

This year's budget changes are unlikely to have equity impacts.

Changes to Program

The budget will increase by $140,000 for repair and maintenance of groundwater equipment.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	478,606	837,430	1,075,600	350,000
External Materials and Services	1,383,729	852,559	999,384	1,268,473
Internal Materials and Services	426,531	558,024	155,917	160,562
Personnel	929,646	1,220,985	1,058,035	1,134,836
Sum:	**3,218,512**	**3,468,998**	**3,288,936**	**2,913,871**
FTE	4	4	3	3

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $2.2 million and the capital budget totals $0.7 million. Main operating costs include staffing, electricity for groundwater pumping, and repair and maintenance of infrastructure. Capital improvements include the rehabilitation of well field infrastructure.

Staffing: Positions that support this program include engineers, operating engineers (employees who operate the water system in the field), program managers, and outreach staff, among others.

Assets and Liabilities: Facilities include 25 active production wells and pumps; collection and transmission pipes; 18 inactive production wells; 168 non-supply wells used for monitoring and resource management; a 2-million-gallon storage tank and 2 inactive tanks; a 100-million-gallon per day (MGD) pumping facility and an inactive 2.5 MGD facility; and associated treatment and monitoring systems. The total replacement value of the groundwater supply system is $240 million. 80% of the assets are in very good, good, or fair condition. The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Treatment

Program Description & Goals

The Treatment Program encompasses the bureau's efforts to make sure drinking water is potable across the bureau's service area. Water treatment facilities for the Bull Run supply are currently located at Headworks (in the Bull Run Watershed) and Lusted Hill (between the watershed and the city). The Headworks facility adds chlorine for primary disinfection. The Lusted Hill facility adds sodium hydroxide for pH adjustment and ammonia to create chloramines. For the groundwater supply, treatment with sodium hypochlorite, ammonia, and sodium hydroxide occur at the groundwater pump station.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program provides the resources to treat water from Portland's sources in the Bull Run Watershed and Columbia South Shore Well Field to meet or exceed all state and federal regulations for drinking water. This includes continuous monitoring and optimization of treatment processes. This program also includes capital infrastructure planning, design and construction, operation, maintenance, and repair of treatment facility systems, and associated regulatory and process control monitoring.

This program will include operating and maintaining the new facilities and infrastructure built as part of the Corrosion Control Improvement and Bull Run Filtration Treatment Projects (to be operational by 2022 and 2027, respectively).

Equity Impacts

The goal of water treatment is to keep water safe to drink. Drinking water quality problems can have a greater impact on communities of color and people with medical disabilities (those with compromised immune systems). This program is also responsible for reducing the potential for lead to leach into water; nationally, lead poisoning disproportionately affects children of color.

Staff in this program do not work directly with the public and do not receive requests for accommodations.

This year's budget changes are unlikely to have equity impacts. As this program grows to include new water treatment processes, the bureau will have the opportunity to explore how equity can be brought into construction and hiring processes.

Changes to Program

The budget will increase by $85,000 for chemical supplies. Because permanent positions were added in the FY 2018-19 budget, two limited-term Treatment Operator positions are no longer necessary and will be eliminated in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	458,918	199,212	3,609,016	9,920,000
External Materials and Services	1,054,411	1,775,274	3,839,880	3,841,722
Internal Materials and Services	327,823	689,772	110,139	153,731
Personnel	1,425,723	1,877,316	3,111,719	3,405,838
Sum:	**3,266,875**	**4,541,574**	**10,670,754**	**17,321,291**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $2.9 million and the capital budget totals $14.5 million. Main expenses in the operating budget include staffing, utilities, chemicals, supplies, and vehicle fleet. Major capital projects include Filtration and Corrosion Control Improvement treatment facilities.

Staffing: Positions that support this program include water treatment operators, laboratory staff, and engineers, among others.

Assets and Liabilities: Assets include the treatment facilities at Headworks and Lusted Hill. The replacement value of the facilities and equipment is $58 million. 90% of the infrastructure is in very good, good, or fair condition.

Program Information

Bureau: Portland Water Bureau

Website:

Program Contact: Tony Andersen

Contact Phone 503-823-8653

Conduits/Transmission Mains

Program Description & Goals

The Conduits/Transmission Mains Program is responsible for bringing water from the city's two water sources, the Bull Run Watershed and Columbia South Shore Well Field, to reservoirs at Powell Butte, then to other in-town reservoirs and tanks at Kelly Butte, Washington Park, Sam Jackson, and Mayfair.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Program efforts are focused on the capital infrastructure planning, design and construction, operations, maintenance, repair, and rehabilitation of the assets in this program, as well as improving operability, reducing risk, and hardening the supply to meet seismic resilience goals. This program also makes sure the conduits and transmission mains are regularly inspected and are protected from corrosive soil. Staff in this program protect the bureau's right of way where conduits cross non-bureau property, and have laid out a protected path for a potential future conduit.

Equity Impacts

The Conduits and Transmission Mains program does not have any clear equity implications.

Staff in this program do not work with the public and do not receive requests for accommodations.

There are no changes to this budget, and there is no likely equity impact of the unchanged budget.

Changes to Program

There are no program changes planned for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	144,335	208,756	624,600	2,284,453
External Materials and Services	1,121,494	2,149,021	842,005	305,525
Internal Materials and Services	655,551	875,472	207,919	205,891
Personnel	1,260,368	1,211,655	1,119,168	1,328,257
Sum:	**3,181,748**	**4,444,903**	**2,793,692**	**4,124,126**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $1.2 million and the capital budget totals $2.9 million. The operating budget's main expenses are staffing, repair and maintenance services, supplies, and vehicle fleet. The capital budget covers conduit assessments.

Staffing: Positions that support this program include engineers, watershed specialists, and operating engineers (staff who operate the water system in the field), among others.

Assets and Liabilities: Major assets in the program include 60.5 miles of conduit (in three conduits) and 50 miles of transmission pipe, as well as supporting trestles and bridges, cathodic protection, Willamette River crossings, and intertie facilities. Conduits 2, 3, and 4 were built in 1911, 1925, and 1953, respectively. The conduits and transmission mains have a total replacement value of $1.7 billion. 50% of the assets are in very good or good condition, with 40% in fair condition and 10% in poor or very poor condition.

The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Terminal Reservoirs

Program Description & Goals

Five in-town reservoirs and tanks serve as primary water storage points for distribution to retail and wholesale customers. These terminal storage facilities are at Powell Butte (outer Southeast Portland), Kelly Butte (also outer Southeast), Washington Park (Southwest), Mayfair (Northwest), and Sam Jackson (Southwest). Portland's terminal storage facilities are managed to maintain the gravity-based delivery of water and water availability for firefighting and emergencies.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Activities of this program include the capital infrastructure planning, design and construction, operation, and maintenance of the terminal storage facilities. Maintenance includes draining, inspecting, and cleaning these facilities as well as repairing and replacing their equipment.

Equity Impacts

Natural disasters that cause water outages can disproportionately affect communities of color, and terminal storage reservoirs are critical to the City's emergency preparedness. The Terminal Reservoirs program also includes the bureau's funding of visitor facilities at Powell Butte, which is in an area of the city with higher than average percentages of people of color and people with low English proficiency.

Most staff in this program do not work directly with the public and do not receive requests for accommodations.

There are no changes to this budget, and there is no likely equity impact of the unchanged budget.

Changes to Program

No program changes are planned for FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	21,338,965	28,805,402	30,749,376	34,434,000
External Materials and Services	532,210	864,535	1,001,926	832,101
Internal Materials and Services	2,195,468	2,118,365	672,215	563,449
Personnel	2,175,278	1,924,466	2,360,552	2,363,772
Sum:	**26,241,921**	**33,712,767**	**34,784,069**	**38,193,322**

Resources: Resources come from ratepayer charges for water and water-related services. Capital investments in water system infrastructure may also be funded with proceeds from issuance of Water Revenue Bonds and capital revenues. Capital revenues include sales of assets and System Development Charges from installations of new mains and services.

Expenses: The operating budget totals $0.9 million and the capital budget totals $37.3 million. The operating budget's main expenses are staffing, supplies, and vehicle fleet. The major capital project is the Washington Park Reservoir.

Staffing: Positions that support this program include engineers, operating engineers (employees who operate the water system in the field), and CADD (Computer-Aided Design and Drafting) technicians, among others.

Assets and Liabilities: Powell Butte has two 50-million-gallon buried reservoirs, one completed in 1981 and the second completed in 2014. Kelly Butte Reservoir was built in 2015 with buried storage of 25 million gallons, replacing an older tank on the site. Washington Park Reservoir is scheduled for completion in 2020 and will have 12.6 million gallons of buried storage, replacing two open reservoirs on the site. Sam Jackson and Mayfair, built in 1964 and 1967 respectively, have total storage of 8.5 million gallons. Each terminal storage facility includes piping, mechanical control buildings, vaults, pumps, and electrical infrastructure. The total replacement value of terminal storage is $460 million. 93% percent of terminal storage is in very good, good, or fair condition.

The Water Bureau has a robust Asset Management Program, with asset life-cycle strategies detailed in twenty-three asset management plans by asset type. These plans contain specific strategies for repair, renewal, and replacement of each asset type. While current condition of any asset type is an important factor, asset condition alone does not drive where and when PWB decides to invest in any given budget program. To learn more about Water Bureau asset management, visit portlandoregon.gov/water/assets.

Program Information

Bureau:	Portland Water Bureau	**Program Contact:**	Tony Andersen
Website:		**Contact Phone**	503-823-8653

Administration & Support

Program Description & Goals

The Administration & Support Program provides overall direction to the bureau in order to meet program objectives. The program supports the Citywide goal to protect and enhance the natural and built environment by delivering services that support the work of other bureau programs. This is a new program offer for FY 2019-20 and does not have any associated performance measures.

Included within this program's budget are:
• The Office of the Director, including Equity and Policy Development and Communications.

• The Business Operations and Finance Services Division, which includes Budget and Finance, Emergency Management and Safety, Facilities, Training and Workforce Development, Human Resources, Recruitment and Hiring, Loss Control/Risk Management, Special Projects, Building Code Appeals, Code and Policy Development, and Front Desk/Administrative Support.

• The Portland Online Permitting System (POPS) and associated technology staff are included in the Administration & Support Program for budgeting purposes; however, organizationally POPS is a separate division.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Office of the Director helps BDS achieve its overall mission and goals by setting the bureau's strategic direction, driving implementation of BDS's Racial Equity Plan, and providing effective communication tools and strategies.

Business Operations and Finance Services provides administrative and infrastructure services to the rest of the bureau, supporting BDS's operational programs as they administer State building codes and local City Code, providing direct services to customers and the community.

Equity Impacts

Through the Equity and Policy Development section, the Administration & Support Program bears responsibility for leading the implementation of BDS's five-year Racial Equity Plan (launched in December 2016) and making progress toward racial equity in bureau programs and services. Equity and Policy Development staff works with staff from other bureau programs to identify strategies and apply an equity lens to all bureau services.

BDS is tasked with administering State building codes and City regulations related to development, and primarily responds to requests for service and information from customers and community members. The bureau has taken specific steps to promote equity in its recruitment and hiring decisions, contracting, and community outreach and education. BDS has also launched two new programs with a focus on serving communities of color and other underserved communities. These two new programs (Small Business & Arts Program and Permitting Solutions Program) are described in more detail in the Development Services Program section. BDS is also working to put metrics in place to better track progress and determine the success of these efforts.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored.

Budget and Finance staff in Administration & Support will continue closely tracking and reporting on bureau workloads, revenues, and expenditures to help bureau managers make informed decisions regarding bureau staffing, programs and services, and fees.

As part of a significant bureau re-organization, the bureau's Technology Team has been moved from Administration & Support to the Portland Online Permitting Services (POPS) Program, while the Records Conversion team has been moved to Permitting Services.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	122,369	2,477,464	0
External Materials and Services	3,209,933	3,781,311	4,932,829	5,825,965
Internal Materials and Services	8,659,148	10,617,387	10,050,048	8,487,514
Personnel	6,545,604	7,633,213	10,748,136	9,568,245
Fund Expense				
Contingency	0	0	79,962,243	55,006,712
Debt Service	48,361,418	16,350,767	1,860,492	1,443,126
Fund Transfers - Expense	1,734,257	2,065,916	2,407,161	2,536,838
Ending Fund Balance	76,632,770	76,568,095	0	0
Sum:	**145,143,130**	**117,139,058**	**112,438,373**	**82,868,400**
FTE	67.03	81.5	81.94	78.8

Resources: Administration & Support is supported by revenue generated by fees and charges for services. As the program provides services to the entire bureau, it is supported by revenue from all revenue generating programs.

Expenses: Primary expenditures in Administration & Support are personnel related. The program also acts as a center for pooling rent and facilities related costs, bureau technology infrastructure development and support, customer service and communications, equity and policy development, and Fund level expenditures. Costs in Administration and Support are disbursed to revenue generating programs.

Staffing: Administration & Support includes 78.8 FTE for FY 2019-20, an increase from 67.03 FTE in FY 2016-17. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Elshad Hajiyev
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-7338

Combination Inspections

Program Description & Goals

The Combination Inspections Program (referred to as “Residential Inspections” on the BDS organizational chart) ensures that new and remodeled one- and two-family residences meet building safety codes and requirements. In this program, the goal is for all inspectors to obtain State of Oregon certification in all four specialties: structural, mechanical, plumbing, and electrical. This approach saves contractors and homeowners time and money in scheduling inspections and allows the City to perform more inspections with fewer staff. Cost savings have been realized through this program, and other jurisdictions have recognized the quality of Portland’s training program and are using it as a model.

The Combination Inspections Program includes the Field Issuance Remodel Subprogram.

Combination Inspections supports the Citywide goal to protect and enhance the natural and built environment.

Combination Inspections’ Key Performance Measure is the number of inspections completed per day per inspector. This number has decreased from 26.46 in FY 2017-18 to 23.41 in the first half of FY 2018-19. This number is projected to improve to 25.0 in FY 2019-20. The bureau’s target is 28.0 inspections per day per inspector. Meeting this target contributes to the Portland Plan goal to ensure quality, affordable housing by minimizing delays in construction, thus reducing costs.

BDS also tracks the number of inspection trips reduced through the use of inspectors who are certified in multiple disciplines; a single inspector may be able to inspect in up to four disciplines. This number was 19,196 in FY 2017-18 and was 8,777 through the first half of FY 2019-20. The bureau expects this number to be 18,000 in FY 2019-20. Finally, the bureau tracks the overall number of inspections performed. 125,254 inspections were performed in FY 2017-18 but has since decreased due to the decline in construction activity; this number was 56,823 through the first half of FY 2018-19 and is projected to be 92,000 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of Residential Inspections	117,675	125,254	126,000	92,000	92,000
Number of inspections per day, per inspector	26.98	26.46	28.40	25.00	28.00
Number of inspection trips reduced due to multi-certified inspectors	19,130	19,196	19,450	18,000	19,000

Explanation of Services

The Combination Inspections Program is one of several BDS programs that helps fulfill the bureau’s obligation to administer the State building code program. The services provided under Combination Inspections ensure compliance with the State’s structural, mechanical, plumbing, and electrical codes, as well as various City Code titles. This program promotes community health and safety by helping to ensure that residential structures and other installations meet all applicable code standards.

Equity Impacts

Combination Inspections is tasked with administering State building codes and City regulations related to commercial development. These services are generally provided citywide as requested by customers. BDS has been providing equity training and customer service training to the staff in the Combination Inspections Program, as well as recruiting, promoting, and hiring a more diverse workforce to better reflect the demographics of the community. BDS is developing several process improvements that will result in more convenience for all residential inspections customers, such as a simpler process for residential bathroom additions, more online services, and real-time inspection results information.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored. Combination Inspections' workload has not yet been affected by the slowdown, but the impact will likely be felt in the next 12-18 months.

Combination Inspections' work will be significantly impacted with the implementation of the Portland Online Permitting System (POPS). The inspection scheduling process will move from a phone-based to an online system, and inspectors and customers will be able to perform inspection-related activities through new mobile apps.

As part of a significant bureau re-organization, Combination Inspections has been made into a separate bureau division; it had previously been part of the Inspections Division with Commercial Inspections.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	406,435	297,603	489,676	567,181
Internal Materials and Services	318,960	463,155	468,696	441,990
Personnel	4,975,550	5,969,367	7,609,924	7,996,554
Sum:	**5,700,945**	**6,730,124**	**8,568,296**	**9,005,725**
FTE	48.92	61.22	61.45	61.1

Resources: Combination Inspections is supported by revenue generated by fees and charges for services. These fees include building, mechanical, electrical, and plumbing permit revenue collected from residential development projects.

Expenses: Primary expenditures in Combination Inspections are personnel related. The program also has expenditures related to the maintenance and parking of the bureau's fleet. Costs in Combination Inspections are disbursed to the bureau's Building/Mechanical, Electrical, Plumbing, and Field Issuance Remodel Programs.

Staffing: Combination Inspections includes 61.1 FTE for FY 2019-20, an increase from 48.92 FTE in FY 2016-17 and just below 61.22 FTE in FY 2017-18. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Dave Tebeau
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-6802

Commercial Inspections

Program Description & Goals

The Commercial Inspections Program performs state-mandated construction inspections (structural, electrical, plumbing, and mechanical) on industrial, commercial, and multi-family construction projects in Portland and the urban services area of Multnomah County. The program also provides plan review services for commercial plumbing and electrical permits, and a full range of permitting and inspections services in the Facility Permit Program (FPP).

Commercial Inspections supports the Citywide goal to protect and enhance the natural and built environment. The Program also works together with both Portland Fire & Rescue and the Multnomah County Health Division to provide a safe and healthy work and living environment for Portland residents.

Commercial Inspections' Key Performance Measure, the number of inspections completed per inspector per day, is at 11.4 through the first half of FY 2018-19, lower than the 13.7 from FY 2017-18. The bureau's strategic target is 14.0 inspections completed per inspector per day. Making progress toward this target contributes to the Portland Plan goal to ensure quality, affordable housing by minimizing delays in construction, thus reducing costs.

Another important performance measure is the percentage of inspections made within 24 hours of request. This number has increased from 87% in FY 2017-18 to from 93% through the first half of FY 2018-19. The bureau's strategic target is 95%. Finally, the number of commercial inspections is projected to decrease due to a decline in construction activity, from 65,892 in FY 2017-18 to 60,000 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of Commercial Inspections	60,030	65,892	62,000	60,000	60,000
Number of commercial inspections per day, per inspector	13.35	13.70	13.60	12.00	14.00
Percentage of commercial inspections made within 24 hours of request	83%	87%	85%	92%	95%

Explanation of Services

The Commercial Inspections Program is one of several BDS programs that helps fulfill the bureau's obligation to administer the State building code program. The services provided under Commercial Inspections ensure compliance with the State's structural, mechanical, plumbing, and electrical codes, as well as the City's Sign, Zoning, and Site Development codes. This program promotes community health and safety by helping to ensure that commercial buildings, multi-family residential structures, and other commercial installations meet all applicable code standards.

Equity Impacts

Commercial Inspections is tasked with administering State building codes and City regulations related to commercial development. These services are generally provided citywide as requested by customers. Through equity training of BDS inspections staff, increased awareness of the challenges faced by those in underserved communities, and customer service training, the BDS inspections culture is becoming more equipped to address the needs of customers of color and others. An example is the development of BDS's new Cannabis Facilities Program, with an emphasis on industry partners of color, to assist them with getting facilities permitted and inspected.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored. Commercial Inspections' workload has not yet been affected by the slowdown, but the impact will likely be felt in the next 12-18 months.

Commercial Inspections' work will be significantly impacted with the implementation of the Portland Online Permitting System (POPS). The inspection scheduling process will move from a phone-based to an online system, and inspectors and customers will be able to perform inspection-related activities through new mobile apps.

As part of a significant bureau re-organization, Commercial Inspections has been made into a separate bureau division; it had previously been part of the Inspections Division with Combination Inspections. A new Cannabis Facilities Program has been created within Commercial Inspections, to work with permit applicants and owners of cannabis facilities.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	360,612	504,816	503,200	635,393
Internal Materials and Services	470,910	532,810	921,583	781,931
Personnel	5,339,433	5,753,645	6,398,022	7,894,191
Sum:	**6,170,955**	**6,791,271**	**7,822,805**	**9,311,515**
FTE	46.79	50.37	59.8	59.55

Resources: Commercial Inspections is supported by revenue generated by fees and charges for services. These fees include building, mechanical, electrical, and plumbing permit revenue collected from commercial development projects.

Expenses: Primary expenditures in Commercial Inspections are personnel related. The program also has expenditures related to the maintenance and parking of the bureau's fleet. Costs in Commercial Inspections are disbursed to the bureau's Building/Mechanical, Electrical, Plumbing, and Facility Permit Programs.

Staffing: Commercial Inspections includes 59.55 FTE for FY 2019-20, an increase from 46.79 FTE in FY 2016-17 and 50.37 FTE in FY 2017-18. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Darryl Godsby
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-5787

Compliance Services

Program Description & Goals

The Compliance Services Program is composed of Zoning and Construction Code compliance workgroups. These workgroups primarily respond to constituent complaints, investigate potential violations, and work with property owners, businesses, and tenants to resolve compliance issues at the lowest level possible.

The Compliance Services and Neighborhood Inspections programs together comprise the bureau's Property Compliance Inspections Division. The combined division includes Zoning Compliance, Landlord Training, Work without Permit, Dangerous Buildings, Signs & A-Boards, Nuisance, Housing, Derelict Buildings, Exterior Maintenance Requirements on non-Residential Structures, Chapter 13/Systematic Inspections, and Chronic Offenders. For budgeting purposes, Neighborhood Inspections is shown as a separate program.

Compliance Services supports the Citywide goal to protect and enhance the natural and built environment.

BDS tracks several workload measures for Compliance Services. The number of properties assessed code enforcement fees fluctuates from year-to-year, and was at 143 through the first half of FY 2018-19. This number is projected at 290 in FY 2019-20. The total number of zoning code activities (violation cases, inspections, and letters) is projected to decrease from 5,121 in FY 2017-18 to 4,348 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of enforcement cases prepared and presented to code hearings officer	1	2	2	2	2
Number of zoning code violation statistics (cases, inspections, and letters)	5,626	5,121	5,350	4,348	5,000
Number of home occupation permits issued	106	112	115	110	110
Number of properties assessed code enforcement fees	377	270	340	290	290
Number of construction code violation cases	333	276	260	150	150

Explanation of Services

Each year, Compliance Services responds to more than 10,000 inquiries regarding zoning, construction, and other code violations. Compliance Services' work is vital in ensuring safe, healthy structures and places for Portlanders to live, work, and play.

Equity Impacts

Compliance Services is tasked with administering City regulations regarding code violations and responding to requests for information from community members. These services are generally provided citywide as requested by community members. Compliance services staff are on the front lines in dealing with issues related to inequity and how underserved communities and communities of color are impacted by longstanding institutionalized racism, oppression and inequity. Staff is concerned about gentrification's causes and its impacts on individuals and neighborhoods, and have this context as they address complaints from neighbors and work to resolve issues and direct property owners to resources that can provide assistance. Additionally, BDS has launched the Permitting Solutions Program to assist communities of color and other underserved communities in resolving code violations and navigating the process to get their property back into compliance with applicable codes. More information on this program is provided in the Development Services Program section.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored.

As part of a significant bureau re-organization, Compliance Services and Neighborhood Inspections have been reorganized into a new Property Compliance Inspections Division.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	25,593	39,407	41,605
Internal Materials and Services	0	31,440	36,723	32,771
Personnel	0	403,080	1,414,852	1,692,787
Sum:	**0**	**460,113**	**1,490,982**	**1,767,163**
FTE	12.03	10.8	10.89	14.08

Resources: Compliance Services is supported from fees and charges for services and lien revenue.

Expenses: Primary expenditures in Compliance Services are personnel related. Code compliance costs are allocated to the Building/Mechanical, Electrical, Plumbing, Site Development and Environmental Soils Programs.

Staffing: Compliance Services includes 14.08 FTE for FY 2019-20, an increase from 12.03 FTE in FY 2016-17 and 10.8 FTE in FY 2017-18. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Beth Benton
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-3349

Development Services

Program Description & Goals

The Development Services Program (referred to as “Permitting Services” on the BDS organizational chart) manages the flow of the public permitting process, from early assistance to permit issuance to digitizing and maintaining the records for completed projects. Trade Permit staff reviewed and issued almost 43,000 plumbing, electrical, mechanical, and sign permits in FY 2017-18. Permitting Services staff performed intakes for over 10,650 building permit applications in FY 2017-18, while assigning reviewers, tracking reviews, and issuing permits. Process Managers guide customers with large and complex projects through the permitting process; higher-level assistance for complex projects can be provided through the Major Projects Group.

Development Services’ Key Performance Measure is the percentage of pre-issuance checks completed within 2 working days of the last review approval. This number has increased from 70% in FY 2017-18 to 72% through the first half of FY 2018-19. It is projected to remain at 72% in FY 2019-20. Making progress in this area contributes to the Portland Plan goal to ensure quality, affordable housing by minimizing delays in construction, thus reducing costs.

The bureau also tracks the percentage of building permits that are issued over-the-counter (on the same day as permit intake); this number has decreased slightly from 52% in FY 2017-18 to 48% through the first half of FY 2019-20. The total number of building permits issued (commercial and residential) is projected to decrease due to the decline in construction activity from 10,324 in FY 2017-18 to 9,000 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of issued commercial building permits	3,431	3,363	4,850	3,100	3,100
Number of issued residential building permits	6,820	6,832	8,100	5,900	5,900
Total number of issued commercial and residential building permits	10,251	10,195	12,950	9,000	9,000
Number of electrical permits	19,131	19,066	19,178	15,800	15,800
Number of mechanical permits	11,203	11,913	12,218	11,700	11,700
Number of plumbing permits	11,016	11,123	10,898	10,400	10,400
Number of sign permits	733	835	774	780	780
Percentage of building permits issued over the counter the same day as intake	54%	52%	56%	55%	56%
Percentage of pre-issuance checks completed within two working days of last review approval	62%	70%	70%	72%	80%

Explanation of Services

The Development Services Program is one of several BDS programs that helps fulfill the bureau’s obligation to administer the State building code program. The services provided under Development Services ensure compliance with the State’s structural, mechanical, plumbing, and electrical codes, as well as various City codes. This program promotes community health and safety by helping to ensure that structures and other installations meet all applicable code standards.

Equity Impacts

Development Services is tasked with administering State building codes and City regulations related to development. In addition, Development Services staff manages the flow of projects through the system, from permit intake and set up, to addressing, to charging the appropriate fees for service and issuing permits after all reviews have been approved. These services are provided citywide as requested by customers. Through equity training and customer service training, staff is gaining new tools and awareness in how the community is served and tailoring services to better meet the community's needs. Examples of the changes being made are the launching of the Small Business & Arts Program and the Permitting Solutions Program.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored.

As part of a significant bureau re-organization, Development Services ("Permitting Services") has been made into a separate bureau division; it had previously been part of the Plan Review & Permitting Services Division with the Plan Review section. Permitting Services includes two new programs that are intended to better serve communities of color and other underserved communities: the Small Business & Arts Program and the Permitting Solutions Program.

• The Small Business & Arts Program is intended to help entrepreneurs and small business owners of color in navigating the development review process, such as providing assistance in what to look for when selecting a tenant space to start a business. The arts portion of the program is intended to help artists get permits for creative spaces and arts venues, with a focus on communities of color and other underserved communities.

• The Permitting Solutions Program is also focused on better serving communities of color and other underserved communities by assisting individuals with code violations on their property to navigate the process to get their property back into compliance with the code.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	645,836	74,166	588,029	301,598
Internal Materials and Services	0	959,118	417,719	527,841
Personnel	9,814	425,061	5,563,327	6,866,991
Sum:	**655,650**	**1,458,345**	**6,569,075**	**7,696,430**
FTE	44.14	5	61.95	63.95

Resources: Development Services is supported by revenue generated by fees and charges for services. As the program provides services to the bureau functions through activities in the Development Services Center, it is supported by revenue from the programs using these services.

Expenses: Primary expenditures in Development Services are personnel related. Costs in Development Services are disbursed to the programs using its services.

Staffing: Development Services includes 63.95 FTE for FY 2019-20, an increase from 44.14 FTE in FY 2016-17. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	David Kuhnhausen
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-7940

Land Use Services

Program Description & Goals

The Land Use Services Program (LUS) is responsible for implementing the goals and policies of the City's Comprehensive Plan, including neighborhood and community plans. This is accomplished through administration of the Portland Zoning Code (Title 33 of the City Code), which includes the City's Land Division Code, Metro's Functional Plan, the Oregon State Transportation Planning Rule, and Oregon State Land Use Goals. LUS reviews development proposals for compliance with the Zoning Code (as part of the building permit process); provides public information regarding zoning regulations; performs discretionary reviews of development proposals (the land use review process); and supports legally- mandated record-keeping and public notices.

LUS supports the Citywide goal to protect and enhance the natural and built environment.

LUS has two Key Performance Measures. First, the percentage of commercial new construction reviews completed within 20 days of application intake has increased from 77% in FY 2017-18 to 84% through the first half of FY 2018-19. This number is projected to decline to 70% in FY 2019-20. Second, the percentage of application completeness reviews completed within 14 days of application intake for Type II land use reviews has increased from 50% in FY 2017-18 to 80% in the first half of FY 2018-19. It is expected to decrease to 65% in FY 2019-20. Making progress in these areas contributes to the Portland Plan goal to ensure quality, affordable housing by minimizing delays in construction, thus reducing costs.

BDS also tracks the number of land use review and final plat applications, which has decreased significantly from 916 in FY 2016-17 to 775 in FY 2018-19. The number is projected to decline further to 610 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of medical bills	3,996	3,704	3,855	3,724	3,724
Percentage of Commercial Permit (New Construction) First Review done within 20 days of application intake	74%	77%	75%	70%	70%
Percentage of Type II Land Use Reviews - Application Completeness Review done within 14 days of application intake	37%	50%	40%	65%	65%

Explanation of Services

LUS's primary responsibility is to administer the requirements of the Portland Zoning Code (Title 33), which guides and limits development in Portland in order to meet the goals of the City's Comprehensive Plan. The services provided by LUS help ensure compliance with the State's structural, mechanical, plumbing, and electrical codes, as well as various City Code titles. This program promotes community health and safety by helping to ensure that residential structures and other installations meet all applicable code standards.

LUS staff guides applicants, citizens, and other governmental agencies through all phases of the development review process as they relate to zoning regulations. Zoning regulations are land use regulations and policies that implement community goals and protect community resources while guiding new development. Zoning regulations affect all new construction, most alterations, commercial occupancy changes, property line changes and most site development activity, including some tree cutting and landscaping.

Equity Impacts

LUS is tasked with administering City regulations related to zoning. These services are generally provided citywide as requested by customers. However, the neighbors of proposed development also feel the impacts of the development changes in their neighborhood and often participate in the land use review process by responding to notices mailed to their homes and businesses. A City Planner has been assigned to work with the BDS Equity and Policy Development Team to operationalize the 5-year Racial Equity Plan with the work of the Land Use Services Program, specifically related to their charge to administer the Portland Zoning Code.

Changes to Program

Since land use review is generally the first step in development projects, Land Use Services began to see a slowdown in work before other BDS programs. A hiring freeze has been in place for LUS since the beginning of 2018, and the bureau reduced staff through layoffs and reassignments in March 2019. Further, BDS reviewed its land use fee schedule to identify where increases were needed in order to maintain cost recovery (BDS land use fees had not been increased in the last five years). The bureau took a fee change proposal to City Council in February 2019 and the changes intended to increase Land Use Services revenue by approximately 5% overall were implemented April 1, 2019. At the Approved Budget stage, City Council also voted to approve an amendment allocating $70,000 in General Fund monies to Land Use Services to allow customer fees charged for work on Historic Resource Reviews to be set below cost recovery. Eleven FTEs that were eliminated during the beginning of the budget development process were also restored.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	246,188	319,360	363,836	316,934
Internal Materials and Services	1,003,533	1,346,889	1,580,522	281,559
Personnel	7,591,467	8,544,159	9,767,828	9,866,465
Sum:	**8,841,188**	**10,210,409**	**11,712,186**	**10,464,958**
FTE	81.7	83.7	80.7	77.7

Resources: Land Use Services is supported by revenue generated by fees and charges for services. This revenue can be divided into two categories, case review, and planning and zoning. Case review revenue is generated from services provided prior to permit application while planning and zoning reviews take place after permit application. A portion of the services provided by Land Use Services are not revenue generating as the program reviews and supports the implementation of code amendment projects of the Bureau of Planning and Sustainability.

Expenses: Primary expenditures in Land Use Services are personnel related. A portion of the time spent is related to the review and implementation of code amendment projects brought forth by the Bureau of Planning and Sustainability.

Staffing: Due to declines in workload and revenues, BDS has imposed a hiring freeze through the end of 2019, and the bureau reduced staff through layoffs and reassignments in March 2019. BDS does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Kim Tallant
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-0977

Neighborhood Inspections

Program Description & Goals

The Neighborhood Inspections Program protects the health, safety, and welfare of Portland residents, prevents the deterioration of existing housing, and contributes to neighborhood livability by enforcing minimum standards for residential structures and exterior maintenance requirements on non-residential properties, outdoor areas, and adjacent rights-of-way.

The Compliance Services and Neighborhood Inspections programs together comprise the bureau's Property Compliance Inspections Division. The combined division includes Zoning Compliance, Landlord Training, Work without Permit, Dangerous Buildings, Signs & A-Boards, Nuisance, Housing, Derelict Buildings, Exterior Maintenance Requirements on non-Residential Structures, Chapter 13/Systematic Inspections, and Chronic Offenders. For budgeting purposes, Neighborhood Inspections is shown as a separate program.

The Neighborhood Inspections program supports the Citywide goals to protect and enhance the natural and built environment and to maintain and improve neighborhood livability.

Neighborhood Inspections' Key Performance Measure, the number of housing units brought up to code (including Enhanced Rental inspection pilot program) fluctuates from year-to-year. This number was 2,509 in FY 2016-17, 1,604 in FY 2017-18, and 1,119 through the first half of FY 2018-19. The number is projected to be 2,360 in FY 2019-20. Making progress in this area contributes to the Portland Plan goal to ensure quality housing and to equity goals in the City's Comprehensive Plan.

The number of nuisance properties cleaned up was 2,426 in FY 2017-18 and is projected to be 2,600 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of nuisance inspections	8,178	7,845	8,400	8,600	8,600
Number of housing and derelict buildings inspections	5,873	4,459	4,800	5,050	5,050
Number of housing units brought up to code as a result of Neighborhood Inspection Division efforts (includes enhanced inspection pilot beginning in FY 2010-11)	2,509	1,604	1,730	2,360	2,360
Number of properties cleaned up	2,381	2,426	2,632	2,600	2,600
Number of housing intakes	2,105	2,105	2,165	2,116	2,165
Number of nuisance intakes	4,148	4,275	4,530	4,232	4,330
Number of code enforcement fee waiver requests	700	360	710	324	324
Number of housing units inspected (includes enhanced inspection pilot beginning in FY 2010-11)	5,080	3,596	3,850	2,016	2,016

Explanation of Services

Neighborhood Inspections enforces the City's Property Maintenance Code, which covers the maintenance of residential dwellings, accessory structures, and the land they occupy. More than just formal enforcement, program staff provides education and referrals to assist property owners toward the goal of better housing. It is important to note that while primary efforts are toward public safety, part of the mission is the protection of property and contributions to neighborhood livability.

Equity Impacts

Neighborhood Inspections is tasked with administering City Property Maintenance regulations and responding to requests for information from community members. These services are generally provided citywide as requested by community members.

However, Neighborhood Inspections also implements two programs targeted toward lower-income and/or underrepresented populations:

• The Extremely Distressed Properties Enforcement Program (EDPEP) targets properties not being maintained (often due to abandonment/foreclosures) and with chronic nuisance and housing conditions. These properties pose public health and safety hazards and encourage criminal activity such as trespass, vandalism, graffiti, drug use and sale, and prostitution. EDPEP uses the abatement, vacation, and demolition of property as a key tool, and relieves pressure on the Police Bureau and other City agencies. EDPEP also proactively monitors properties to ensure that conditions are maintained and pursues additional abatements to resolve any recurring conditions.
• The Enhanced Rental Inspection Program identifies rental properties that are chronically out of compliance with the City's Property Maintenance Code and where cited repairs are not made in a timely manner. Resources are then directed toward conducting inspections of other units in the same complex that have potential violations. The program motivates landlords to provide and maintain safe and healthy rental housing while offering protection to vulnerable tenants who might fear retaliation by eviction for reporting substandard housing conditions. This program helps create equitable housing options for community members and provide safe, healthy housing conditions for the City's low-income renters.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored.

As part of a significant bureau re-organization, Compliance Services and Neighborhood Inspections have been reorganized into a new Property Compliance Inspections Division (see organizational chart).

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	411,732	533,822	633,073	655,862
Internal Materials and Services	230,893	458,109	402,495	215,999
Personnel	2,106,930	2,306,768	2,767,042	3,176,820
Sum:	**2,749,555**	**3,298,700**	**3,802,610**	**4,048,681**
FTE	22.48	26.1	27.42	27.77

Resources: Neighborhood Inspections is supported from fees and charges for services, lien revenue, and limited General Fund monies.

Expenses: Primary expenditures in Neighborhood Inspections are personnel related as well as costs associated with nuisance abatement.

Staffing: Neighborhood Inspections includes 27.77 FTE for FY 2019-20, an increase from 22.48 FTE in FY 2016-17 and 26.1 FTE in FY 2017-18. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Beth Benton
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-3349

Plan Review

Program Description & Goals

The Plan Review Program processes and approves building and mechanical permits for residential and commercial structures. Plans Examiners review building projects and provide general information on life safety, energy conservation, accessibility, and related building requirements. Staff helps permit applicants understand building codes and the review process in order to successfully obtain permits for their projects. Staff in the Engineering Plan Review Section reviews structural and mechanical plans to determine compliance with engineering requirements of the Oregon Structural and Mechanical Specialty Code. These reviews are required for any projects that have engineering components.

Organizationally, BDS's Plan Review Services Division is composed of two Plan Review sections, Site Development, and Engineering Plan Review.

The Plan Review program supports the Citywide goal to protect and enhance the natural and built environment.

Plan Review has two Key Performance Measures related to building plan review, which is performed by staff from BDS and as many as five other City bureaus. In FY 2017-18, the City achieved its plan review turnaround goals 68% of the time for residential plans and 60% for commercial plans. Through the first half of FY 2018-19 these numbers are 62% and 61%, respectively. The bureau projects those numbers will increase to 65% for both residential plans and commercial plans in FY 2019-20. Making progress in these areas contributes to the Portland Plan goal to ensure quality, affordable housing by minimizing delays in construction, thus reducing costs.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of residential plans reviewed by all bureaus within scheduled end dates	71%	68%	72%	65%	65%
Percentage of commercial plans reviewed by all bureaus within scheduled end dates	57%	60%	60%	65%	65%

Explanation of Services

The Plan Review Program is one of several BDS programs that helps fulfill the bureau's obligation to administer the State building code program. The services provided under Plan Review ensure compliance with the State's structural, mechanical, plumbing, and electrical codes, as well as various City codes. This program promotes community health and safety by helping to ensure that structures and other installations meet all applicable code standards.

Equity Impacts

Plan Review is tasked with administering State building codes and City regulations related to development. These services are generally provided citywide as requested by customers. Plan Review is partnering with other staff in assisting customers in our new equity-related programs, including the Cannabis Facilities Program, the Small Business & Arts Program, and the Permitting Solutions Program. These programs are all designed to better serve communities of color and other underserved communities.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored.

As part of a significant bureau re-organization, Plan Review has been made into a separate bureau division; it had previously been part of the Plan Review & Permitting Services Division with the Permitting Services section.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	25,400	0	
External Materials and Services	147,587	1,119,266	487,559	569,632
Internal Materials and Services	1,168,216	234,229	57,555	55,289
Personnel	8,671,911	9,852,387	7,167,102	7,817,476
Sum:	**9,987,714**	**11,231,282**	**7,712,216**	**8,442,397**
FTE	47.41	101.92	54.7	54.7

Resources: Plan Review is supported primarily by fees charged for life safety and engineering plan review. These fees are charged based on customer demand for services.

Expenses: Primary expenditures in Plan Review are personnel. Costs in Plan Review are allocated to the Building/Mechanical program.

Staffing: Plan Review includes 54.7 FTE for FY 2019-20. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau: Bureau of Development Services

Website: https://www.portlandoregon.gov/bds/

Program Contact: Doug Morgan

Contact Phone (503) 823-5824

Site Development

Program Description & Goals

The Site Development Program includes plan review for geo-technical, flood plain, grading, private street, and site preparation issues, as well as erosion control requirements on private property. Staff reviews all applicable land use cases, identifying any land suitability issues and conditions. Field staff performs all related inspections, including those required by the Trees and Landscaping requirements for Titles 10 and 33 of the City of Portland Code and all required erosion control measures. Organizationally, Site Development is part of BDS's Plan Review Services Division, along with two Plan Review sections and Engineering Plan Review.

The Environmental Soils subprogram works with property owners who have subsurface sanitary systems in need of repair, replacement, or decommissioning as the City provides public sanitary systems for their use. The City Sanitarian is located in this subprogram.

Site Development supports the Citywide goal to protect and enhance the natural and built environment.

A primary performance measure for Site Development is the number of working days from site development plan submittal to the first review. This number has improved from 10.65 days in FY 2017-18 to 7.38 days in the first half of FY 2018-19. The strategic target for this measure is 7.0 days.

A handful of workload measures are also tracked. The number of site development plan reviews performed is projected to decrease from 4,339 in FY 2017-18 to 4,000 in FY 2019-20. The number of Site Development permit inspections performed is at 256 for the first half of FY 2018-19, on track for over 500 for the fiscal year. This is expected to decrease to 460 in FY 2019-20.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of site development plan reviews	4,338	4,339	4,350	4,000	4,000
Average number of working days to first review	10.58	10.65	8.50	7.00	7.00
Number of site development permit inspections	268	426	250	460	460
Number of site development land use case reviews	1,074	939	980	900	900
Number of sanitation permits and evaluations issued	485	523	550	500	500

Explanation of Services

The Site Development Program helps fulfill BDS's obligation to administer various City Code titles related to development sites and subsurface sanitary systems. The services provided under Site Development ensure compliance with these codes and protects community health and safety.

Equity Impacts

Site Development is tasked with administering City regulations regarding site-related issues. These services are generally provided citywide as requested by customers and in that sense are reactionary.

Changes to Program

All BDS programs are being impacted by the recent slowdown in development work and bureau revenues. A hiring freeze has been applied to all bureau programs through the end of 2019, the bureau has reduced non-priority expenditures, and other cost-saving measures are being explored. Site Development's workload has not yet been affected by the slowdown, but the impact will likely be felt in the next 12-18 months.

• Dust and Site Control Requirements in Residential Demolitions
Oregon Senate Bill 871 allows local jurisdictions to adopt regulations to mitigate the impacts of asbestos and lead-based paint in residential demolition. On July 1, 2018, the City Council established regulations (Portland City Code 24.55.205) and tasked BDS with implementation and enforcement. This work is performed by staff in the Property Compliance Inspections Division, with financial support from the Site Development Program.

• Environmental Soils Program Deficit
Multnomah County and the City have an intergovernmental agreement that gives BDS responsibility for the County's subsurface sewage program. BDS performs this work and is compensated with revenues that the bureau collects from permit fees for this program. The Board of County Commissioners sets the fees, and no additional compensation is given to the City for this work.

Since the end of the Mid-County sewer hookup program in 1998, revenues have dropped substantially in this program. Fee increases have been implemented several times since 1999, but the program still has a significant reserve deficit. In 2005, the City Council agreed to inflationary fee increases until the reserve deficit is paid off. The Board of County Commissioners voted to raise fees by 10% in FY 2012-13 and agreed to 10% fee increases per year for the subsequent four years. A 10% fee increase in FY 2016-17 marked the final year of that agreement. The current forecast projects that the deficit should be eliminated by FY 2018-19.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	79,027	48,455	94,178	100,306
Internal Materials and Services	90,573	43,616	60,125	63,018
Personnel	2,319,941	2,249,965	1,888,612	2,547,068
Sum:	**2,489,541**	**2,342,036**	**2,042,915**	**2,710,392**
FTE	12.2	14.26	22.85	19.05

Resources: Site Development is supported by revenue generated by fees and charges for services.

Expenses: Primary expenditures in Site Development are personnel related.

Staffing: Site Development includes 19.05 FTE for FY 2019-20, an increase from 12.2 FTE in FY 2016-17 and 14.26 FTE in FY 2017-18. BDS has imposed a hiring freeze through the end of 2019 due to declines in workload and revenues, and the bureau does not anticipate adding positions to this program in the near future.

Assets and Liabilities: The bureau's key assets are the POPS Program (BDS's lone capital project) and the BDS vehicle fleet. BDS's 5-Year Financial Plan incorporates current and future costs for repair, renewal, and replacement of these assets. Costs for the vehicle fleet are assigned proportionally to the bureau programs that use fleet vehicles; costs for the POPS Program are assigned proportionally to all bureau programs.

Program Information

Bureau:	Bureau of Development Services	**Program Contact:**	Doug Morgan
Website:	https://www.portlandoregon.gov/bds/	**Contact Phone**	(503) 823-5824

Business Operations

Program Description & Goals

The Business Operations program includes Administrative Services, Finance & Accounting, Risk Analysis and Compliance, Human Resources and Contract Support. These activities ensure that the Bureau service delivery programs have adequate support to carry out their functions in the most efficient and effective means possible. Goals include:

• Ensuring that administrative functions are delivered consistently, reliably, and effectively;
• Providing strong finance, accounting and loan servicing functions;
• Delivering excellence in compliance;
• Supporting the bureau's equity goals through internal business practices, hiring, training and contract goals;
• Ensuring timely, confidential, and supportive human resource services;
• Supporting PHB's advisory and oversight committees including the Portland Housing Advisory Commission, Fair Housing Advocacy Committee, N/NE Neighborhood Housing Strategy Oversight Committee, Bond Oversight Committee and the Rental Services Commission.

Performance goals for the Business Operations program are focused on improving customer service relationships and managing administrative costs. The administrative costs metric below shows variability from year to year. This is because, although PHB's administrative costs remain relatively stable, there is significant variability in overall bureau expenditures from year to year due predominantly to the limited predictability of affordable housing project development cycles.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Administrative costs as a percentage of bureau level budget	5%	5%	5%	5%	5%
Administrative costs as a rolling three-year average	7%	7%	7%	7%	7%

Explanation of Services

The Administrative Services activity provides support to all teams in the bureau through meeting planning, organization, and transcriptions; space organization; managing equipment and supplies; telephone contacts from the public; supporting PHB's advisory and oversight committees, assisting program teams with implementation of their recommendations as appropriate; and other bureau clerical support as needed.

The Finance and Accounting activity provides payment services in coordination with the Office of Management and Finance (OMF) for all program expenditures, including contract payments and loan disbursements; manages the bureau's portfolio of approximately 1,800 loans, managing billings, receiving payments, and tracking deferred payment loans; budgets and monitors over three dozen funds with numerous statutory and policy restrictions; and provides financial reporting on Bureau funds in accordance with City, State, Federal, GASB and GAAP standards.

The Risk Analysis and Compliance (RAC) activity monitors City, State, and Federal compliance by bureau funding partners to protect the City's investment in affordability for low-income families and individuals; provides risk analysis on the financial viability of the housing portfolio for long-term sustainability; monitors regulatory agreements that define rent levels based on tenant's incomes for the next 60 or 99 years, ensuring safe and stable affordable housing for thousands of low-income families and individuals; and monitors prevailing wages on bureau financed construction projects.

The Human Resources activity assists with recruitment and retention of Bureau staff in support of bureau managers. This includes timekeeping, managing the recruitment pipeline (including several classifications unique to the Bureau), organizing and scheduling interview panels, onboarding, FMLA coordination, and other employee-related issues as needed.

The Contract Support activity includes the tracking of bureau contracts from initiation to final approval by the City Clerk's Office; providing expertise to Bureau staff in navigating the City contracting process; managing the sub-recipient contractor monitoring process; managing RFP and RFI processes; and supporting the Finance and Accounting team with requisitions.

Equity Impacts

Within the Business Operations program, equity is a key value in how services are rendered. PHB utilizes MWESB firms for everything from trainings to food for community meetings and facilitation services. The contract specialist ensures that equity goals and standards are consistent across all sub-recipient contracts, and adheres to the City's requirements for RFPs and Goods and Services Contracts. The RAC team tracks residents of regulated units by race, income and family size, which assists the bureau overall in planning for additional units and marketing strategies with community partners.

The HR team ensures that PHB's recruitment and hiring practices are equitable and seeks to hire staff that reflect the communities we serve. Since 2012 the bureau has increased diversity of the staff by nearly 30%; women make up over 70% of the workforce. Additionally, with recent promotions the leadership team is now comprised of 54% people of color and 72% women. This team also develops and tracks the Affirmative Action Goals and Equity roadmap goals for hiring, retention and training of bureau staff.

Changes to Program

A bureau reorganization in late FY 2017-18 brought the RAC team back to Business Operations, leading to increased collaboration between the loan servicing function and housing portfolio risk analysis. This collaboration continues as the two teams formalize the collection of cash flow loan payments due from financed projects. Continued complexity in Bureau financial transactions and potential increased volume of those complex transactions due to the Metro Bond funding will need to be monitored in terms of staffing capacity.
Changes have been made in response to additional compliance work, which has and will continue to grow.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,057,798	1,553,312	1,173,400	2,000,933
Internal Materials and Services	1,479,922	3,279,793	1,534,863	1,351,295
Personnel	2,181,294	2,544,553	2,615,441	2,865,032
Fund Expense				
Contingency	0	0	8,000	25,897
Debt Service	620,894	30,844	0	0
Fund Transfers - Expense	1,935,612	1,087,880	1,402,764	1,022,518
Sum:	**7,275,520**	**8,496,381**	**6,734,468**	**7,265,675**
FTE	21	23.18	23	22.95

Resources: The Business Operations program is funded by many of the Bureau's funding sources, including the many flavors of TIF, federal grants, the HIF, and the General Fund.

Expenses: Program expenses are nearly evenly split between staff costs and bureau operating costs (rent, computer systems maintenance, and inter agencies). Staffing costs are charged to the funding sources noted above – approximately 45% TIF, 15% HIF and General Fund, 25% federal funds, and 15% to the Bond and Building funds. Bureau operating costs are collected in the General Fund but are offset approximately 75% to indirect allocations to other funding sources.

Staffing: The Business Operations program consists of three teams, one contract specialist, and the Business Operations Manager. The Administrative Services team has 5.0 FTE, Finance and Accounting has 9.00 FTE, and the RAC team has 6.95 FTE.

Assets and Liabilities: The Business Operations program has several bureau software systems recorded as assets, most notably the Housing Development Software (HDS) system. HDS is critical to managing and tracking the bureau loan portfolio, as well as tracking compliance for the portfolio of housing projects the Bureau has financed.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Leslie Goodlow
Website:	https://www.portlandoregon.gov/phb/72621	**Contact Phone**	503-823-4160

Data Analytics and Systems

Program Description & Goals

The Data Analytics & Systems team plays a key role in achieving outcomes for affordable housing services and providing stable, affordable, and equitably available housing in Portland. The team uses data driven insights to improve outcomes for affordable housing development and preservation; homeownership and home repair; homeless services; and programs available to renters and landlords. For each bureau program the team works to ensure that data is available, can be analyzed, and aligns with stated policy goals and objectives. Data analytic projects are assessed for their possible outcomes as well as their usefulness to policy makers and the public. All Data Analytics & Systems Team projects have the potential for replication and use in different operational areas inside the bureau or elsewhere in the City. The goal of the team is to produce operational change within the bureau and its programs through the use of research and analysis. This is a new program offer that does not currently have program-specific performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

In the past three years the City has significantly expanded funding and programming along the housing continuum. The Housing Bureau's Data Analytics & Systems Team uses data driven insights to improve the Housing Bureau's programs and policies. The team evaluates the short and long-term impacts of policy changes on housing needs, equity, and Portland's affordable housing market. The team supports and administers the Housing Bureau's data infrastructure and assesses program performance against targets. The team publishes quarterly housing market reports and forecasts, an annual State of Housing report, data visualizations and maps, longitudinal studies, survey development, and provides qualitative and quantitative analysis. The team regularly responds to requests for information from the public, City bureaus, and elected officials.

Data management practices at PHB range from basic to advanced. While PHB datasets are available with metadata on the City's Open Data portal and Portland Maps, some datasets exist in stand-alone systems and are integrated in an ad hoc manner. Data is collected on a quarterly basis if not more frequently and the percentage of missing data is low. Privacy protection is a high priority of the bureau and is performed using an approval process that allows limited PII data to be used for approved projects. Leadership at the bureau and City Council report using PHB research and data analytics products to make policy decisions.

Equity Impacts

The Data Analytics and Systems team recognizes that data and analysis can be powerful tools for distilling vast and disparate data and overcoming obstacles, but it can also inadvertently reproduce biases and inequities. The team works to maintain transparency and incorporate inclusive analytics practices into its work. Datasets with metadata are made available to the public and the team engages in regular reporting to different community groups and stakeholders that are impacted by our work.

Changes to Program

For PHB's new programs and policies, efforts are underway to standardize systemwide data collection and increase analytical capacity to better interpret service outcomes. In the near-term the team is working to revamp how data for the Rental Services and Development Incentives programs is collected and reported to more accurately identify if outcomes are meeting their intended policy goals. In FY 2019-20 the team will be conduct a systems assessment and plan to determine if the bureau's systems needs are being met through its current software and data infrastructure. This work will include exploring a commercial off-the-shelf (COTS) system for data gathering and compliance for the City's Residential Rental Registration program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	234,050
Personnel	0	0	0	1,044,671
Sum:	**0**	**0**	**0**	**1,278,721**
FTE	0	0	0	8.17

Resources: The Data Analytics & Systems Team is funded by a variety of sources within the bureau. Staffing is charged to the same sources as the Policy, Business Operations, and Director's Office programs; TIF, federal grants, the HIF, and the General Fund - reflecting the broad support function the team provides to bureau programs.

Expenses: Program expenses are staffing costs. Annual expenses for data system hosting and maintenance are reflected in the Business Operations program to reflect the bureau-wide usage of many of these systems.

Staffing: Staffing for this program consists of 8.17 FTE. This team collaborates with other bureau staff and service providers in developing data analysis products.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/76186

Program Contact: Antoinette Pietka

Contact Phone 503-823-2394

Director's Office

Program Description & Goals

The Director’s Office works across all sections of the Housing Bureau to ensure the bureau’s strategic initiatives are effective, equitable and responsive to community perspectives and need. The Director’s Office is responsible for oversight across all bureau programs and services; engaging the public in bureau initiatives; fostering and maintaining partnerships within the community; ensuring the bureau works as efficiently as possible; and is transparent and accountable to the public. The Director’s Office is responsible for strategic and policy direction, as well as, Equity and Inclusion, Communications, and Community Engagement. There are no program-specific performance measures associated with this program, but goals are focused on fostering collaborative relationships with the community and organizations, using a data-driven equity approach to bureau policy and decision making, and improving methods of communication and engagement.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Director's Office program exists for many important reasons. The office provides long-range vision and overall direction for Portland's affordable housing investments and strategic initiatives. Moreover, the Director's office advances bureau goals, strategies, and investment priorities with a focus on advancing the bureau's equity agenda.

The Director's Office addresses the broad scope of responsibilities by collaboratively working with a wide range of partners to meet the housing needs of the people of Portland. The office has an important role in ensuring that future policy and implementation decisions of the bureau improve housing access and economic opportunities for traditionally under-served populations. The office works to secure sustainable resources for the ongoing creation and preservation of affordable housing, as well as, ensure internal capacity exists to deliver quality service during the bureau's continuing growth and change. It also serves to support and leverage the guidance of the Portland Housing Advisory Commission, N/NE Neighborhood Strategy Oversight Committee, Bond Oversight Committee, Rental Services Commission, and Fair Housing Advocacy Committee - implementing their recommendations as appropriate.

Equity Impacts

PHB has a well-documented history of supporting equity and inclusion in contracting. Since its inception, the Bureau has met or exceed the City of Portland's goal of 20% Disadvantaged, Minority, Women and Emerging Small Business (DMWESB) for construction sub-contracts. In July of 2016, PHB committed to a goal of 30% DMWESB participation by the year 2021 by implementing annual 2% target increases for all multi-family funded projects. Through a concerted outreach effort, the Bureau also has supported workforce training and hiring goals.

Since 2012 the bureau has increased diversity of the staff by nearly 30%, and women make up over 70% of the workforce. Additionally, with recent promotions the leadership team is now comprised of 54% people of color and 72% women. This team also develops and tracks the Affirmative Action Goals and Equity roadmap goals for hiring, retention and training of bureau staff.

Changes to Program

The Director's Office is heavily impacted by changes in housing policy. As the need for affordable housing and homelessness relief continues, the Housing Bureau will continue to see growth. In response to the growing responsibilities of the Housing Bureau, the Director's Office will include the shifting of a position from Business Operations to provide an Executive Assistant to support the administrative and scheduling needs of the Director (the Director has not had dedicated administrative support in the past). In addition, to meet the growing need to communicate proactively and strengthen its engagement with the public the Director's Office will include a Public Information Manager position funded within existing resources.

Voters approved Oregon Measure 102 to amend the state Constitution to allow more flexibility in the use of bond funds for affordable housing initiatives. This amendment changes the business of PHB since the Bond passed in 2016, in which PHB was prohibited from spending bond funds on any development that was not owned and operated by the city. Now, PHB can lend bond dollars to private parties to fund affordable housing projects, resulting in more affordable units. The Director's Office is heavily involved in planning for and implementing bond projects, and the long-term business plan of PHB.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	45,831	26,980	29,000	31,000
Internal Materials and Services	1,025	60	0	0
Personnel	483,411	506,616	774,576	1,170,416
Ending Fund Balance	22,030,909	23,868,510	0	
Sum:	**22,561,176**	**24,402,166**	**803,576**	**1,201,416**
FTE	3	2	5	8

Resources: This program is funded by a mix of resources; over 40% from Tax Increment Financing resources, with the remaining portions split somewhat evenly among federal grants, the GO Bond, and other local sources. The small amount of external materials and services is likewise spread among the same sources by means of the bureau's internal cost recovery model.

Expenses: Program expenses consist primarily of the costs for seven positions and a small amount of material and services.

Staffing: Staffing funded within the program (8.0 FTE) include the Director, Assistant Director, the Equity and Inclusion Manager the Public Information Manager and Officer, the Public Outreach coordinator; and an Executive Assistant.

Assets and Liabilities: Not applicable.

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/

Program Contact: Shannon Callahan

Contact Phone 503-823-2289

Policy and Planning

Program Description & Goals

The PHB Policy and Planning program staff are responsible for the policy and planning functions of the Bureau. The work of this program is dynamic and includes implementation of community and city plans for new initiatives, policy frameworks for program implementation, policy research and recommendations, city code and administrative rules, Memo of Understanding (MOU)/ Intergovernmental Agreement (IGA) development and implementation, oversight and advisory body staff work. The work of the policy and planning staff is directed by the PHB Director, Commissioner-in-Charge, and City Council.

There are no program-specific performance measures associated with this program, but goals include increased resources to meet and exceed the city's affordable housing goals, the implementation of national housing policy best practices, the structure of programs to meet the changing needs of low-income Portland households, development and implementation of plans and programs based on the direction of City Council, the administrative of code and administrative rules based on direction from City Council.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Affordable housing and homelessness are priority issues for Portlanders and City Council. To address these issues, the city has many new and ongoing initiatives requiring policy and planning work. This program funds staff who each are assigned a portfolio of policy and planning issues. Many initiatives are consistent year-to-year, but as new initiatives are identified by City Council, the Commissioner-in-charge, or the bureau, they are assigned based on workload and expertise.

In recent fiscal years the products of this program include: the Portland Housing Bond policy framework, Joint Office of Homeless Services IGA management, the Permanent Supportive Housing 2,000 unit plan, N/NE Housing Strategy development and implementation, the N/NE Preference Policy development and implementation, mandatory relocation assistance code and administrative rules development, Inclusionary Housing program development, construction excise tax (CET) program development, affordable housing land use bonuses and incentives, the SW Corridor Equitable Housing Strategy, the Broadway Corridor planning.

Equity Impacts

The work products of the policy and planning program offer direct bureau programs, spending, and rules/code, and as a result have a substantial impact on racial equity. The policy and planning staff regularly involve Communities of Color, low-income communities, and historically marginalized communities in planning and decision-making processes, to the extent possible, and produce work products that actualize racial equity.

Changes to Program

The Bureau is moving ongoing General Fund resources within the 1% constraint to this program for the development In the current fiscal year workload and deliverables have expanded to include plans and policies associated with permanent supportive housing, the metro affordable housing bond, Broadway and Southwest corridors, and other planning work. The bureau anticipates continued work in these areas next fiscal year, in addition to new planning work, but the new deliverables can likely be absorbed with current resources.

In addition, the Bureau is adding a limited term Housing Program Coordinator position to analyze and assist with the housing concepts and studies initiated by bureau partners. The position is funded by existing resources due to the broad range of these initiatives.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	150,083	77,013	380,693	587,840
Internal Materials and Services	1,115	313	0	269
Personnel	417,477	798,209	1,597,887	788,135
Sum:	**568,675**	**875,535**	**1,978,580**	**1,376,244**
FTE	3.92	6.74	12.64	6.29

Resources: The Policy and Planning Team is funded by a variety of sources within the Bureau. Staffing is charged to the same sources as the Business Operations, Data Analytics and Systems, and Director's Office programs; TIF, federal grants, the HIF, and the General Fund.

Expenses: Program expenses are primarily salaries and benefits for policy and planning staff, as well as materials and services for consulting, meeting space and materials, printing and distribution, etc.

Staffing: This program includes 6.29 FTE. Staff are assigned a portfolio of policy and planning issues (see explanation of services section) and are responsible for the associated work products.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/26428

Program Contact: Matthew Tschabold

Contact Phone (503) 823-1854

JOHS Administration and Operations

Program Description & Goals

The City makes significant investments in programs and community initiatives to prevent and ultimately end homelessness for tens of thousands of individuals and families each year. In FY 2017, the City of Portland and the County consolidated resources and services under the City and County Joint Office of Homeless Services (JOHS), guided by the shared values and common agenda of the A Home for Everyone (AHFE) partners, and a commitment to maximizing the benefits of local public investments. The JOHS is the backbone agency supporting a collective impact approach to preventing and ending homelessness in the City of Portland and Multnomah County. See other program offers for performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Homelessness is an ongoing crisis in the City of Portland and Multnomah County. In the last several years, our community has come together and responded in unprecedented ways. The JOHS represents a shared commitment between the City of Portland and Multnomah County to expand, improve, and simplify access to the range of services needed to address homelessness in our community.

Created by a July 2016 intergovernmental agreement between the City of Portland and Multnomah County, JOHS administers contracts for homeless services, plans and manages systems of care, oversees system reporting and evaluation, conducts homeless street counts and one night shelter counts, and writes proposals to and monitors funds issued by the U.S. Department of Housing and Urban Development's Continuum of Care program. These operations affect the lives of tens of thousands of homeless singles, youth, and families, as well as survivors of domestic violence in Portland and Multnomah County.

Through the JOHS, funds are contracted to more than 40 nonprofit and public agencies to provide a comprehensive range of services to assist people experiencing homelessness or housing instability. The JOHS receives funding and policy direction from the City of Portland and Multnomah County, and policy guidance from A Home for Everyone (AHFE), our regional ending homelessness initiative, as well as the City of Gresham and Home Forward. The JOHS, by integrating staffing and funding, offers the City and County enhanced operational coordination and effectiveness in the delivery of homeless services.

Equity Impacts

The JOHS is committed to and has taken numerous steps to realize the AHFE goal of achieving racial equity in homeless services and eliminating disparate rates of homelessness on the basis of race and ethnicity. To that end, the JOHS has: (1) improved data collection and outcome reporting using inclusive racial identities; (2) created standards of practice for all contractors that include cultural responsiveness and/or culturally specific service provision; (3) included a requirement for organizational equity assessments, plans, and progress reporting in all contracts; (4) prioritized and increased funding to culturally specific organizations through local procurement processes and prioritization of culturally specific programs in competitive federal applications; and (5) prioritized staff support to the AHFE Equity Committee, the local launch of a national initiative to address the role of racism in causing and perpetuating homelessness ("Supporting Partnerships for Anti-Racist Communities"), and the implementation of the AHFE equity lens in all AHFE planning efforts (including most recently around planning for chronic homelessness and permanent supportive housing). The JOHS is further increasing its internal capacity to support racial equity work through the recent hire of an Equity Manager, who will lead the JOHS' racial equity efforts with AHFE and our contractors, and the development and implementation of both the County's and an office-specific workforce equity plan.

Changes to Program

In FY 2018-19, $1.25 million was budgeted as one-time-only funding for Emergency Shelter strategic capital improvements.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	151,168	45,200	1,250,000	645,135
Internal Materials and Services	-34	0	0	0
Personnel	-168	0	0	0
Sum:	**150,966**	**45,200**	**1,250,000**	**645,135**

Resources: The City's proposed contribution to the JOHS budget includes City General Fund and two federal grants (1) Emergency Solutions Grant (ESG) and (2) Housing Opportunities for Persons with AIDS (HOPWA).

Expenses: City funds are pass thru payments to JOHS and are used to support office staffing and service charges for facilities, information technology, distribution and records, and materials and supplies for office operations. City funds are passed through to the JOHS. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: For specific FTE detail, please see the Multnomah County JOHS Budget.

Assets and Liabilities: Not applicable.

Program Information

Bureau: Portland Housing Bureau

Website: multco.us/joint-office-homeless-services

Program Contact: Marc Jolin

Contact Phone 503-988-5531

JOHS Employment Services

Program Description & Goals

A Home for Everyone (AHFE) partners have prioritized alignment of employment and housing resources to help people who are experiencing, or are at-risk of homelessness, to achieve long-term economic and housing stability. This highly effective program connects employment and housing resources for homeless families, youth and communities of color. The Homeless Youth continuum far exceeded its target goals in FY 2018 but the outcomes are not anticipated for FY 2019. See other program offers for performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program sustains critical capacity in several targeted employment and housing initiatives, with an emphasis on meeting the needs of families, youth, and communities of color. All programs assist households experiencing homelessness or housing instability by offering a combination of housing assistance and access to a range of workforce supports, provided in a culturally specific or culturally responsive manner. Programs include:

• Family Employment Services provides capacity to an existing network of six nonprofit employment providers, to connect families to career track employment services, housing resources and community-based support, and to the Employment Opportunity Program (EOP). Participants who are survivors of domestic violence and/or who are eligible for Supplemental Nutrition Assistance Program (SNAP) are prioritized.

• Youth Employment Services expands capacity provided by Homeless Youth Continuum partners to improve employment and housing alignment through pre-readiness support, job training, day labor opportunities and work experiences/internships.

• Equitable Access to Employment, implemented by a culturally-specific provider, supports individuals and families seeking employment and experiencing homelessness to secure culturally-specific employment services.

Adult Employment Services and Rent Assistance provides capacity through the EOP, and its multiple culturally-specific providers, to offer employment and housing support for adults, including adults in couples or parents with adult children, rent assistance for housing placement, and career coaching and expanded one-stop employment services and resources to serve young adults of color, many of whom are exiting the corrections system.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/ African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native,10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

This program advances racial equity by targeting employment and housing resources to communities of color. Of the employment and housing support services provided to participants that are experiencing homelessness or at imminent risk of losing their housing, at least 75% are from communities of color.

Changes to Program

This program includes $133,680 of one-time-only funding. In FY 2018-19, Employment Services were part of the Diversion program and have been moved into a stand alone program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	925,100
Sum:	**0**	**0**	**0**	**925,100**

Resources: The City's contribution to the JOHS budget includes City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: multco.us/joint-office-homeless-services

Program Contact: Marc Jolin

Contact Phone 503-988-5531

JOHS Homelessness Diversion

Program Description & Goals

Diversion services are a subset of homelessness prevention strategies in our community. This program represents the City funding to reduce the number of people becoming street and shelter homeless in our community by diverting them from homelessness when they are leaving incarceration, a hospital, an unsustainable doubled-up situation. Done correctly, diversion is a much better strategy for the individual or family because they avoid the trauma of becoming homeless, and for the community, because, like other prevention strategies, it can be substantially less costly to divert a person from homelessness than to help them end it once they have become homeless.

Important Note: Unless otherwise noted, the outputs and outcomes presented in the JOHS Program Offers reflect total outputs/outcomes achieved through all investments in those program areas, including County and City ongoing and one-time funding, and additional leveraged state, federal and private resources.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of individuals prevented from becoming homeless	6,139	7,458	5,020	8,000	8,000

Explanation of Services

As an intervention, diversion is considered a trauma informed approach that keeps individuals and families from falling into street and shelter homelessness by helping them identify and gain access to alternative temporary and long-term housing options. Diversion is recognized nationally and locally as a critical tool in reducing street and shelter homelessness.

This program funds diversions from homelessness for AHFE priority populations, in particular for women, people of color and people with disabilities and people fleeing domestic violence. All of the providers contracted to provide services through this program are culturally specific or culturally responsive. Diversion occurs primarily through three recommended strategies adopted by the AHFE Executive Committee, all of which have been shown to be effective at diverting people from homelessness:

• Flexible financial assistance for agencies providing shelter or coordinating access to shelter that allows them to help people sustain a current non-permanent living situation (e.g. safely doubled up) rather than come to shelter;

• Staff and financial support to assist with placing people who are leaving healthcare and treatment programs directly into permanent housing; and,

• Long-distance transportation assistance to individuals and families with permanent housing options in other communities and who without the transportation assistance could not access that permanent housing and would instead access the local shelter system.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/ African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native,10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those newly prevented from becoming homeless in FY 2018: 33% identified as Black/African American; 28% Hispanic/Latino/a/x; 8% American Indian/Alaska Native; 4% Native Hawaiian/Other Pacific Islander; and 4% Asian.

Changes to Program

This program includes $1,255,560 of one-time-only funding.
In FY 2018-19, Employment Services were part of the Diversion program and have been moved into a stand alone program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	841,380	1,530,197	2,356,295	1,525,500
Sum:	**841,380**	**1,530,197**	**2,356,295**	**1,525,500**

Resources: The City's contribution to the JOHS budget is City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: multco.us/joint-office-homeless-services

Program Contact: Marc Jolin

Contact Phone 503-988-5531

JOHS Supportive Housing

Program Description & Goals

Supportive housing is recognized as the most successful intervention for people with significant disabilities who are homeless or at imminent risk of homelessness. Supportive housing is most commonly permanent housing, but in certain circumstances, including for people in recovery, transitional supportive housing (limited duration housing with intensive attached services) has proven an effective strategy to help people stabilize and return to un-supported permanent housing. The significant majority of supportive housing in our community is permanent supportive housing; it offers those who are chronically homeless or living with significant ongoing disabilities the combination of permanently affordable rent and longer-term wrap around support services they need to truly end their homelessness. This program offer funds a combination of long-term support services and operating expenses connected to supportive housing.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of homeless individuals placed in permanent housing	4,889	5,591	4,513	5,900	5,900
Retention rate of households placed in permanent housing at 12 months	74%	59%	75%	75%	75%
Percentage of households moved from homelessness into housing that subsequently return to homelessness	27%	28%	27%	26%	26%

Explanation of Services

On any given night, there are nearly 1,300 individuals who have been homeless for more than a year and are living with one or more severe disabilities. These individuals are considered chronically homeless. Supportive housing programs are our community's most effective response to chronic homelessness. Offering a combination of permanently affordable housing and appropriate ongoing support services has proven locally and nationally to be the most cost effective way to end the homelessness of this population. This program offer provides continued support for two types of programs prioritized by and coordinated through AHFE for these individuals – transitional recovery housing and permanent supportive housing.

Supportive housing is for those who would not be successful in their housing without additional supportive services, and for whom services would be less effective without stable housing. Permanent supportive housing serves those with long-term disabilities, including mental illness and addictions, who usually have long-term or cyclical homelessness in their background. Transitional recovery housing serves those who require time-limited intensive recovery and other support services, but who can be anticipated to graduate from those intensive support services and into unsupported permanent housing. Transitional housing programs typically provide no-cost or extremely low-cost housing for up to two years, coupled with intensive recovery support services tailored to the needs of the program's target population.

This program supports a range of supportive housing for highly vulnerable disabled adults. In some cases, funding is used to provide only the support services because rent assistance is provided through, for example, a grant from the U.S. Department of Housing and Urban Development (HUD). In other cases, funds support primarily the long term rental subsidy needs of program participants, and support services are leveraged through other systems, such as the health care system. Finally, there are programs where local funds provide both the rental assistance and the bulk of the support services because of the unique needs of the subpopulation served by the program and/or the absence of other sources of support.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/ African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native,10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those served in Permanent Supportive Housing in FY 2018: 24% identified as Black/African American; 15% Hispanic/Latino/a/x; 13% American Indian/Alaska Native; 4% Native Hawaiian/ Other Pacific Islander; and 3% Asian.

Changes to Program

In late 2017, the Portland City Council and the Multnomah County Board of Commissioners adopted parallel resolutions directing the development of a plan to guide the production of at least 2,000 new units of supportive housing in Multnomah County by 2028. The plan was completed in September, 2018, and in the time since the Resolutions were adopted, the City, County and Home Forward have documented 517 new units of supportive housing that have already been developed or are in the pipeline. Many of these units have been created through coordinated capital investments from the Portland Housing Bond and dedicated supportive service funding through the Joint Office of Homeless Services. The creation of new supportive housing units will be dependent on identification of additional supportive housing capital, operating and services funding. Recent passage of the Metro Regional Affordable Housing Bond, completion of a related regional supportive housing plan (anticipated in early 2019), and advancement of developing partnerships with the health and criminal justice sectors will aid in these efforts.

This program includes $471,440 of one-time-only funding.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	5,357,844	6,804,694	10,248,327	10,503,994
Personnel	2	-130	0	0
Sum:	**5,357,846**	**6,804,564**	**10,248,327**	**10,503,994**

Resources: The City's contribution to the JOHS budget includes City General Fund and the federal grant, Housing Opportunities for Persons with AIDS (HOPWA).

Expenses: City funds are pass thru payments to JOHS and are used to support staffing and contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities:	Not applicable.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Marc Jolin
Website:	multco.us/joint-office-homeless-services	**Contact Phone**	503-988-5531

JOHS Housing Placement/Retention

Program Description & Goals

This offer is for the City support for housing placement and retention. For the majority of people experiencing homelessness, returning to permanent housing requires a combination of a limited duration, highly flexible rent assistance, housing placement and retention support staffing, and income acquisition assistance. This housing placement and retention strategy, often referred to as “rapid rehousing”, is a recognized national best practice and critical element of the housing placement strategies prioritized through A Home for Everyone (AHFE) to significantly decrease homelessness among the most vulnerable in our community. It accounts for a significant majority of new placements into housing each year.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of homeless individuals placed in permanent housing	4,889	5,591	4,513	5,900	5,900
Retention rate of households placed in permanent housing at 12 months	74%	59%	75%	75%	75%
Percentage of households moved from homelessness into housing that subsequently return to homelessness	27%	28%	27%	26%	26%

Explanation of Services

This program continues a range of existing housing placement and retention programs developed and coordinated through AHFE and the JOHS, including key elements of the housing placement capacity expansion initiated during FY 2017. These investments in rapid rehousing programs leverage significant federal, state and local resources to support the efforts of people experiencing homelessness to secure and retain permanent housing. Services are delivered by a range of highly skilled nonprofit partners and directed to communities of color, women, and other vulnerable adults experiencing homelessness. They include flexible rent assistance and housing placement and retention staffing accessed through:

• Culturally-specific service providers serving communities of color;
• Shelters, day centers and street outreach programs;
• The Short Term Rent Assistance program that consolidates at Home Forward multiple federal, state and local funding streams into aligned eviction prevention and rapid rehousing delivered through close to 20 non-profit partners; and,
• Multi-agency mobile in-reach teams that include staff from culturally-specific, domestic violence, and behavioral health providers to assist adults in emergency shelters and other safety-off-the-streets options (like organized camps) to quickly exit shelter and return to housing.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/ African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those newly placed in Rapid Rehousing in FY 2018: 42% identified as Black/African American; 16% Hispanic/Latino/a/x; 11% American Indian/Alaska Native; 5% Native Hawaiian/Other Pacific Islander; and 3% Asian.

Changes to Program

$252,000 of housing placement contracted staffing and the associated client rent assistance was reduced to meet the 1% General Fund Constraint.
This reduction eliminates the safe parking pilot program that partners with faith institutions to host people sleeping in vehicles, RVs, or sleeping pods in their parking lots as a form of safety off the streets. It also reduces the capacity for the Coordinated Housing Assessment Team (CHAT), which provides services to highly vulnerable people who need more intensive staff engagement and support. $185,000 of previously contracted funds are being reallocated into direct staffing to support the ongoing adult system programming work of the JOHS. We expect that any reductions in household placements will be offset by improvements in overall system support and service coordination resulting from more appropriate system staffing. This program includes $1,859,620 of one-time-only funding.
Reported 12-month retention rates are anticipated to remain at FY 2018 levels due to continued housing market challenges and income stagnation.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	12,246	608,264	8,896,785
Sum:	**0**	**12,246**	**608,264**	**8,896,785**

Resources: The City's contribution to the JOHS budget is City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support staffing and contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities:	Not applicable.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Marc Jolin
Website:	multco.us/joint-office-homeless-services	**Contact Phone**	503-988-5531

JOHS Safety Off the Streets

Program Description & Goals

This offer represents the City support for basic safety of people experiencing homelessness. This includes a range of emergency night and day shelter services, including shelter for specific populations, winter and severe weather shelter, and associated emergency services expenses. While not a solution to homelessness, emergency shelter and associated emergency services are vital to protecting the basic health and safety of individuals and families while they are experiencing homelessness, particularly those with disabling conditions and older adults. Day and night shelters are also critical locations for people to learn about and access the services they need to find permanent housing, acquire an income, and receive health-related services. Most adult shelters have priority access for women, Veterans, those with disabilities and those ages 55 & older. Other shelters are specifically for youth under 24, domestic violence survivors, and families with children.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Average length of time (days) spent in homeless shelter (all populations)	60	48	85	110	110
Number of individuals who accessed homeless services, but who had not accessed homeless services in the previous two years	6,077	5,018	6,400	5,000	5,000

Explanation of Services

The basic safety of people experiencing homelessness requires funding for a full range of emergency night and day shelter services, including shelter for specific populations, severe weather shelter, and associated emergency services expenses. Emergency shelter and associated emergency services are vital to protecting the basic health and safety of individuals and families while they are experiencing homelessness, particularly those with disabling conditions and older adults. Day and night shelters are also critical locations for people to learn about and access the services they need to find permanent housing, acquire an income, and receive health-related services. Most adult shelters have priority access for women, Veterans, those with disabilities and those ages 55 and older. This program includes the following:

Night shelter: Overnight shelter programs for all populations include approximately 1,400 beds of year round shelter and 300 beds of winter shelter. Shelters are low-barrier and most, such as the Willamette Center, operate 24/7. Funds are contracted to nonprofit providers to pay the operating expenses for shelter, including maintenance, staffing, materials/supplies, and on-site services.

Day shelter: Day shelters serve the purpose of providing a safe place to be out of the elements during the day, access to showers and other hygiene services, and as a vital point of access to the services needed to end homelessness. Day shelters function as resource centers, bringing together numerous partners at one location to offer an array of services, including employment, health care, and education.

Severe weather shelter: In the event of severe weather that significantly elevates the risk to people sleeping unsheltered in our community, additional shelter capacity is created that remains in place for the duration of the severe weather event. This program includes base funding that is contracted to a nonprofit agency to open severe weather shelter on an as-needed basis during the course of the year.

Emergency assistance: This program also funds an array of services associated with ensuring basic safety, including staffing, flexible funding for material needs, and extended information and referral services during winter months.

Alternative shelter: Alternative shelter spaces (including, e.g., “villages”) provide a safe space to sleep and access resources for those who are not currently served by traditional shelters. People using these alternative shelters have improved access to services with the goal of moving in to permanent housing as quickly as possible.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/ African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native,10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those served in Emergency Shelter in FY18: 21% identified as Black/African American; 13% Hispanic/Latino/a/x; 12% American Indian/Alaska Native; 4% Native Hawaiian/Other Pacific Islander; and 2% Asian.

Changes to Program

The Adopted Budget adds $250,000 in ongoing funding to support increased operating costs for two higher quality, year round adult shelters in the coming fiscal year. Year-over-year decreases in total people served in shelter are primarily due to increased length of time in shelter, as people in shelter continue to face challenges finding permanent housing opportunities. Increased permanent housing placement will likely decrease length of time in shelter and increase numbers served in shelter. This program includes $2,793,250 of one-time-only funding.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	10,649,973	7,443,824	9,898,582	10,716,344
Personnel	28,839	37,398	0	0
Sum:	**10,678,812**	**7,481,222**	**9,898,582**	**10,716,344**
FTE	0.22	0.28	0	0

Resources: The City's contribution to the JOHS budget is City General Fund and the federal Emergency Solutions Grant (ESG).

Expenses: City funds are pass thru payments to JOHS and are used to support staffing, contracted services, and facilities charges. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: Not applicable.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Marc Jolin
Website:	multco.us/joint-office-homeless-services	**Contact Phone**	503-988-5531

JOHS System Support Services

Program Description & Goals

Improving system coordination and access is one of the core strategies of A Home for Everyone. This program funds an array of support services needed to make homeless services easier to access and more effective. These services support systems of care across populations as well as specific sub-populations (adults, families, youth, Veterans and domestic violence survivors). These supports include training, information and referral services, coordinated entry, partnership development, and other similar services. See other program offers for performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The effectiveness of homeless services, overall and at the population-specific level, depends on the support services funded through this program. These services include:

• Access: Equitable and efficient access to available services is an essential commitment of A Home for Everyone. Access starts with information about the services available, and that information must be available in a variety of formats to reach diverse populations. Programs supported in this area include telephone, online and print information and referral, as well as in-person assessment. Equitable and efficient access to services also requires coordinated entry systems tailored to specific populations.

• Training/Education: Through A Home for Everyone, our community has adopted a set of guidelines for the delivery of services, and those guidelines anticipate certain shared practices that require system-wide and population-specific training for staff. There are also training and education programs offered to support people seeking services, both community-wide and within specific populations.

• Partnership Development: Increasing the resources available to people experiencing homelessness, beyond those funded through the JOHS, requires the development of partnerships that leverage resources in other systems and in the private sector. This program offer funds programs that foster these partnerships for the benefit of the effort to end homelessness as a whole and for specific populations. Examples include coordination among landlords and service providers, as well as services to recruit and support landlords to make units available for households referred through community nonprofits.

• Point-In-Time Count: In order to receive HUD funding, communities must conduct an annual point-in-time count of people sleeping in homeless shelters and a biennial point-in-time count of people sleeping in places not meant for human habitation (i.e. tents, cars, etc.). The sheltered and unsheltered count is a community-wide effort involving dozens of organizations. The funding requested will provide the support necessary to undertake a count including administrative support, communication, partner coordination, volunteer recruitment and management, as well as data entry and evaluation.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/ African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native,10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

On a quarterly basis, between 29% and 32% of the Information and Referral callers were African American, 13-14% were Hispanic or Latino, 6% were Native American or Alaska Native, and 2-3% were Asian or Native Hawaiian/Other Pacific Islander, respectively.

Changes to Program

The additional 40% or $431,800 of the City General funds for this program can be found in the Direction to Develop package for continuation of services funded with one-time-only funding.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,587,561	102,772	1,045,910	1,152,540
Personnel	37,267	23,829	0	0
Sum:	**1,624,828**	**126,601**	**1,045,910**	**1,152,540**
FTE	0.26	0.17	0	0

Resources: The City's contribution to the JOHS budget is City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support staffing and contracted services that cross systems of care and populations to improve access to homeless services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: Not applicable.

Program Information

Bureau: Portland Housing Bureau

Website: multco.us/joint-office-homeless-services

Program Contact: Marc Jolin

Contact Phone 503-988-5531

Economic Opportunity Initiative

Program Description & Goals

PHB funds the Economic Opportunity Initiative (EOI), a citywide program focused on increasing income and economic self-sufficiency for very low-income residents. Prosper Portland administers the microenterprise component of the program and contracts with seven community agencies to provide services. Worksystems, Inc. administers the adult and youth workforce components and contracts with eleven community agencies to provide employment services.

The goals of the program are to increase the incomes and economic opportunities for very low-income Portland residents through workforce and microenterprise development. EOI is focused on reaching participants who often face multiple barriers to employment, including but not limited to: homelessness, limited English proficiency, criminal histories, drug and alcohol addictions, and lack of educational credentials and job preparation skills.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of workforce participants	1,178	1,394	825	825	825
Total number of Microenterprise participants	262	210	350	300	300
Percentage of workforce participants employed at graduation	65%	40%	65%	40%	40%
Percentage of microenterprises increasing economic stability at program exit	85%	41%	85%	41%	41%

Explanation of Services

The City Council authorized the formation of the EOI program in 2004 to increase economic development and workforce opportunities for very low-income Portland residents. Advancing economic opportunity is a goal of the City and part of the City/Multnomah County Consolidated Plan. In July 2009, EOI was transferred from the former Bureau of Housing and Community Development to Prosper Portland. The PHB maintains an IGA with Prosper Portland to implement this direction. The mission of the EOI is to provide services in the categories of microenterprise and workforce development. The initiative prioritizes reaching people with multiple barriers to economic opportunity, including those experiencing homelessness, limited English proficiency, criminal histories, drug and alcohol addictions, and lack of education and job preparation skills.

There are two components to the EOI, Microenterprise and Workforce Development. The Microenterprise component consists of Prosper Portland contracting with community-based organizations to provide technical assistance and training to business owners and entrepreneurs in various areas including licensing, financing and taxes, business plans, financial literacy, legal assistance, marketing, product development, production and management strategies. Program success is measured by the number of individuals receiving microenterprise services and the number of businesses achieving stabilization and growth milestones.

The Workforce Development component of the program is accomplished by Prosper Portland contracting with Worksystems, Inc., our jurisdiction's local workforce investment board, to administer services through sub-recipient contracts with community-based agencies. These agencies provide the following services to youth and adult job seekers: career planning, work readiness training, job training and placement, job search assistance, college readiness, post-secondary placement and retention support. Additionally, organizations are funded to provide community based workforce navigation services through the workforce system. Success of this program is determined by the amount of people served with workforce services, placed in employment, and enrolled in post-secondary education.

Equity Impacts

The goal of EOI is to provide access to services for individuals from marginalized communities. EOI partners include culturally-specific and culturally responsive agencies who prioritize reaching participants from communities of color, immigrants and refugees and low-income participants. Additionally, the workforce program prioritizes support to those who have drug and/or alcohol addictions or have a history with the criminal justice system. Last fiscal year (FY17-18,) 68% of participants in EOI identified as people of color. Data is collected and reported on a quarterly basis and is disaggregated by race and ethnicity. Program staff analyze data to determine issues and opportunities for improvement to advance more equitable access and outcomes. One significant change implemented in FY17-18 was adding capacity of two culturally appropriate Workforce Community Navigator staff (for a total of three FTE), to reach individuals and communities not currently engaged with WorkSource centers and/or who are experiencing additional barriers to accessing services.

Changes to Program

EOI services in FY 2019-20 are anticipated to be funded at approximately the same level as FY 2018-19 year. PHB anticipates a similar entitlement amount from HUD in FY 2019-20. The program will not be impacted by the 1% constraint requirement. EOI plans to maintain consistent staffing levels to provide services in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	-21,196	0	0	2,280,648
Personnel	0	0	0	0
Sum:	**-21,196**	**0**	**0**	**2,280,648**
FTE	0	0	0	0

Resources: This program is funded by CDBG, a federal entitlement grant. CDBG for EOI funding is based on a standard percentage applied to entitlement amount from HUD. PHB reimburses Prosper Portland for as expenses are incurred.

Expenses: Funds for EOI support direct service delivery. A majority of the funding covers personnel expenses at partner organizations. A smaller portion covers participant support services which includes items necessary for clients to access services such as work clothing, transportation fees and school supplies. CDBG funds may also be used for operating costs that are explicitly connected to the direct services being delivered. CDBG funding does not cover any administrative costs for the sub-recipients.

Staffing: CDBG funding does not cover any staffing costs at Prosper Portland or Worksystems, Inc.; those costs are covered through other non-PHB funding sources. CDBG and additional funds cover personnel at four service delivery organizations for microenterprise and 13 service delivery organizations (22 programs) for workforce development. Staffing at partner organizations is directly linked to how much funding is allocated to these programs each year. The PHB contract manager (0.05 FTE) is funded by CDBG as well.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: www.portlandoregon.gov/phb/26428

Program Contact: Jennifer Chang

Contact Phone 503-823-2391

Housing Development Support

Program Description & Goals

This program encompasses support services and captures other general expenditures related to the long-term successful operation of multifamily affordable housing and Portland Housing Bureau's partners. This program is supported by staff in the Housing Investment and Portfolio Preservation (HIPP) team and the Risk Analysis and Compliance (RAC) team.

Program components include:
• the Risk Management Pool (RMP), funded by the bureau and managed by the Housing Development Center (HDC); • Community Housing Development Organization (CHDO) operating assistance, funded by HOME funds and used by a CHDO (private non-profit, community-based organizations) that have staff with the capacity to develop affordable housing for the community it serves;
• The HOME Consortium, designated by HUD is a is a way for local governments that would not otherwise qualify for funding to join with other contiguous units of local government to directly participate in HOME funds; and • HUD Section 108 loan repayment.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The RMP provides funds training and education to the owners of multifamily affordable rental housing providing supportive housing. The pool also makes payments in the event a claim is made against the RMP. HDC will review and process the paperwork to ensure compliance with the RMP requirements.
CHDO Operating funds support capacity building among qualified owner, developer, or sponsor entities of HOME funded projects just before, during, and just after a project that is an eligible set-aside activity.
HOME Consortium activities include participation by Multnomah County in joint projects with PHB (like the Stark Street project currently under construction) and homeownership loans provided by the City of Gresham.
Section 108 activity in this program is the annual repayments to HUD, which will extend beyond 2030.

Equity Impacts

The RMP is targeted for residents who have been or are currently homeless. A significant portion of the local homeless population also suffer from chronic mental health issues, substance abuse and addiction. Locally, we have a disproportionately high number of people of color amongst the homeless population, specifically African Americans, who earn significantly less and have been priced out of most neighborhoods in Portland.

Changes to Program

In the current fiscal year, workload and deliverables have not changed as management of these contracts continue without shifts in the Bureau requirements. The RMP will be re-evaluated as part of the regional discussion on funding PSH units.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	930,696	879,880	2,232,714	1,764,120
Internal Materials and Services	0	431	0	0
Personnel	71,986	138,974	62,000	79,796
Fund Expense				
Contingency	0	0	154,000	0
Debt Service	726,268	734,577	16,408,000	756,000
Fund Transfers - Expense	636,237	5,133,333	1,162,705	2,841,340
Sum:	**2,365,187**	**6,887,196**	**20,019,419**	**5,441,256**
FTE	0	0	2.08	0.6

Resources: Program resources include the federal HOME entitlement grant, reserved for use by Multnomah County, Gresham, and CHDO eligible partners, as well as the federal CDBG entitlement committed to Section 108 loan payments. The Risk Mitigation Pool is a reserve located in the Housing Investment Fund that has been in place for over ten years. Staff costs have multiple funding sources, including tax increment financing and federal grants.

Expenses: Program expenses include the staffing costs for portions of several position supporting these program elements among the HIPP and RAC teams. Home Consortium funding reflects federal HOME grant dollars anticipated to be spent by Multnomah County and Gresham. The Section 108 repayment is made from PHBs CDBG entitlement, offset partially by payments made to PHB by project funding partners.

Staffing: Staffing is 0.6 FTE, which reflects portions of several positions in the bureau working on specific program activities as well as general support of multi-family project financing.

Assets and Liabilities: Section 108 loan payments to HUD are a program liability that extends beyond FY 2030, and currently results in approximately $730,000 in annual debt service. This payment reflects a pool of funds that financed capital assets owned by other non-governmental entities through loans to those entities. These assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland.

The RMP is an asset maintenance tool that PHB makes available to affordable housing owners and developers as discussed in the program description section. As noted above, while these assets are not owned by the City, they are assets funded by the City.

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/74685

Program Contact: Jill Chen

Contact Phone 503-823-3339

Multi Family Affordable Ownership Project Financing

Program Description & Goals

Since 2016, PHB has focused on creating affordable homeownership opportunities in the Interstate Corridor Urban Renewal Area (ICURA) for qualified households prioritized through the N/NE Preference Policy. Although real estate prices in Portland have recently leveled, most homes continue to be out of reach for the average low and moderate-income households. The lack of affordable homeownership inventory continues in the private market, particularly in neighborhoods that are gentrifying such as in N/NE Portland. In the 2017 Notice of Funding Availability (NOFA), PHB addressed this by focusing resources and available land on subsidizing the development of new multifamily condo development for mixed income projects. PHB continues to administer Prosper Portland N/NE Community Development Initiative resources to help moderate income households (80% AMI to 120% AMI) purchase and retain homes within the Interstate Urban Renewal Area.

The Multi Family Affordable Ownership Project Financing program collaborates with several Bureau programs; including the Policy and Planning program who identifies N/NE Preference buyers and with the Homeowner Access program who coordinates buyer readiness and home ownership training. The Bureau works with its partners to leverage City resources to develop projects such that its investments can become a permanent subsidy upon sale to qualified low-income buyers. During FY17-18, it was determined that $125,000 per unit subsidy was required for the construction of new permanently affordable homes in the ICURA and that PHB's subsidy could apply to those households earning 80% Area Median Income (AMI) or less for a 2BR and 100% AMI or less for a 3BR. These subsidized homes are permanently affordable and regulated at their respective income levels even after the initial home owners sells their home.

Program commitments are presently exclusive to the implementation of the N/NE Housing Strategy and include: The Olin, a Habitat for Humanity development, for 12 affordable condos which is under construction; the Kilpatrick Phase 1 & 2 , a Habitat for Humanity development, for 30 affordable condos expected to start construction by 4/30/19; and a Proud Ground Project for 40 new affordable condos on 5020 Interstate, PHB owned land, which is in pre-development.
This is a new program offer and does not yet have program-specific performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

This program seeks to address the need for affordable home ownership and the opportunity for wealth creation especially for people of color who historically have been displaced in N/NE Portland. The program provides affordable homes to low and middle-income households, earning on average between 45-100% Area Median Income (AMI) or from $36,630 to $81,400 for a family of four. Housing produced under this program is regulated for a minimum of 99 years or is permanently affordable.

New multifamily, affordable condos cannot be developed without subsidy which buys down the cost of the affordable units. This program provides the needed City funds to enable the projects to be developed by non-profit partners. This program seeks to optimize Bureau investments, including land leases, by working with other funding sources including commercial banks/lenders, philanthropic institutions and the State. Bureau staff works with the developer during predevelopment, financial close, through completion of construction. The total process can be 12 months to over 4 years depending on size and complexity of the development.

This program provides the opportunity for home ownership to many households whose families were severely impacted by displacement in ICURA. Units sold provide housing stability to home owners and gives them the opportunity for wealth creation.

Equity Impacts

For all PHB multifamily development programs, PHB partners are required to report on their efforts to provide contracting opportunities to minority, women and emerging small business (MWESB), and must comply with federal and local low-income workforce utilization goals. However, PHB partners have indicated that it may be difficult to meet these targets due to the leveraged “sweat equity” required by some of the projects. In addition, MWESB subcontracting performance remains a challenge largely due to the extremely tight construction market and the difficulty in finding certified firms with available capacity.

Changes to Program

PHB has created the Multi Family Affordable Ownership Project financing program in response to market trends of homeownership affordability. The median home sales price citywide rose from $257,487 in 2011 to $406,192 in 2017, an increase of 58 percent, or over $148,000. The median home sales price in Portland now exceeds $400,000 in over two thirds (68 percent) of the neighborhoods in the city. The median home sales price in the Interstate Corridor is $449,386, an increase of 71% from the 2011 median of $263,435, making affordable homeownership out of reach for most people of color whose families have been displaced in the ICURA. According to the State of Housing Report, homeownership rates among Black, Native, and Hawaiian-Pacific-Islander households is 30% or less compared to White households at 54%.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	3,380,000
Personnel	0	0	0	175,345
Sum:	**0**	**0**	**0**	**3,555,345**
FTE	0	0	0	1.35

Resources: The Multi Family Ownership Project Financing program is currently focused in the ICURA, utilizing TIF funds limited to that geographic area. TIF funds for multi-family ownership are currently riding benefitting from resources created by the increase in housing set-aside in 2015. As forecast by both the Bureau and Prosper Portland over the last few years, TIF funding will subside over the next four years as almost all districts reach maximum indebtedness or the final year to issue debt. To continue the program and expand its geographic reach additional sources of funds will need to be developed.

Expenses: Almost all program expenditures are disbursements made as part of the financing package for multi-family affordable ownership projects. PHB lends the resources listed above to make up a financing “gap” typically found with affordable projects. These gap funds cover the difference between the equity a project attracts and the money that can be borrowed against the project as part of the financing package. For FY 2019-20, the amounts appropriated are either a) projects under construction, b) projects with a legal funding commitment, or c) projects for which funding has been awarded. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program consists of 1.35 FTE, budgetarily, and includes staff from multiple teams to effectively implement the program.

Assets and Liabilities: This program finances capital assets owned by other non- governmental entities through loans. These assets are represented on the City's financial statements by loan receivables (for which the City holds a property lien). The value received by the City through the loans is the value of the units created in the community. These assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland.

Both PHB gap-financed and owned multi-family buildings are required to have asset management plans and replacement reserves. For the gap financed projects, the bureau has an Risk Assessment and Compliance (RAC) team that reviews regulatory agreements for compliance with asset management requirements, grant funding requirements, and in some cases financial condition. In addition, physical condition inspections are done by construction coordinators as requested by the RAC team.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Jill Chen
Website:	https://www.portlandoregon.gov/phb/index.cfm?&c=72705	**Contact Phone**	503-823-3339

Development Incentives

Program Description & Goals

The Development Incentives program encompasses all financial incentives and exemptions related to the production of affordable housing in both the private market and regulated affordable housing. The program includes the Inclusionary Housing (IH), Multiple-Unit Limited Tax Exemption (MULTE), Non-Profit Limited Tax Exemption (NPLTE), Homebuyer Opportunity Limited Tax Exemption (HOLTE), System Development Charge (SDC) Exemption and Affordable Housing Construction Excise Tax (CET) Exemption, and the Mortgage Credit Certificate (MCC) Programs.

The program's primary goals are to promote inclusion of affordable housing in otherwise market-rate developments and to assist affordable housing developed and operated by non-profit partners, as well as to make homeownership more affordable to low- to moderate-income households.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of households receiving indirect assistance through foregone revenue (mortgage credit certifcate, limited tax exemption, and system development charge exemption)	142	104	142	140	140
Percentage of housing units opened or preserved in high opportunity areas	73%	60%	50%	50%	50%

Explanation of Services

Policy makers at the State and City Council implemented regulations to increase the number of affordable units built. For-profit and non-profit housing developers benefit from exemption programs, reducing permitting expenses and the on-going cost of property taxes for both rental and homeownership projects, as well as, both single- and multi-family developments. Homebuyers also benefit from a reduction in their long-term income taxes.

The Inclusionary Housing Program requires that buildings with 20 or more new units make at least 20% of the units affordable to households earning at or below 80% of median family income (MFI) with options for complying. The options include: 1) provide 10% of the new building's units at or below 60% MFI; 2) provide 20% of the new building's units at 60% MFI; 3) provide 20% of the new building's units at 60% MFI, or 10% of the new building's units at 30% MFI, in another new building; 4) provide 25% of the new building's units at 60% MFI, or 15% of the new building's units at 30% MFI, in an already existing building; or 5) pay a fee-in-lieu of providing affordable units.

The MULTE, HOLTE and NPLTE Programs, as well as the SDC and CET Exemption Programs reduce the cost of developing and preserving affordable multi- and single-family rental and homeownership projects.

The Mortgage Credit Certificate Program makes homeownership more affordable and accessible through a direct federal income tax credit.

Staff reviews and approves applications prior to construction of new developments, and prior to home purchases to confirm that both the property and the homebuyer meet program criteria. The outcomes of these programs can be seen through creating mixed-income neighborhoods, more affordable units for 10, 60 or 99 years ensuring long-term stability for families, keeping home prices below market rates, and reduced property or income taxes.

Equity Impacts

Developers providing affordable housing through the IH, MULTE, HOLTE and SDC exemption programs are encouraged to partner with local non-profit housing providers to reach households most in need of the affordable housing the program makes available. The MULTE Program requires that at least 5% of affordable units within a project be fully adaptable to ADA standards.

The interim-use MULTE program requires applications to include a contract with a third-party technical assistance provider to help the general contractor be successful towards reaching a 20% participation goal in construction contracting by MWESB firms.

Changes to Program

Although the dynamics of the housing market are constantly evolving, the need for affordable housing, including at 60% and 80% median family income continues. Changes to programs include:

• Refinements to the IH Program including adjustments to the applicability of the MULTE program for IH projects, consolidation and clarification of the IH fee-in-lieu rates, and the adoption of administrative rules for the IH Homeownership program;
• Approved use of the MULTE program on an interim basis for projects not required to participate in the IH Program; and
• Monitoring the income affordability of subsequent homebuyers purchasing homes in the HOLTE Program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	20,826	47,466	163,533	1,110,459
Internal Materials and Services	1,738	125,956	24,547	8,572
Personnel	165,181	211,297	363,868	753,878
Ending Fund Balance	1,847,976	11,139,941	0	
Sum:	**2,035,721**	**11,524,660**	**551,948**	**1,872,909**
FTE	2.67	3.71	3.45	6.15

Resources: Program income is currently generated through application and processing fees. Cost of living adjustments to these fees are anticipated for FY 2019-20. It is planned that a portion of in-lieu fee payments will become the primary funding stream for these program activities, but the bureau is looking at additional options. Further, the FY 2019-20 Adopted Budget includes $150,000 in one-time General Fund resources for a market analysis to provide data and analysis for ongoing refinements to the Inclusionary Housing program incentives and requirements.

Expenses: Program costs for the inclusionary housing and indirect program activities are primarily for staffing and indirect costs. On-going expenses are limited and include document recording fees, payment to the Multnomah County for each MULTE and HOLTE application approved, and an application fee to the State upon renewing allocations for the MCC. PHB allocates a percentage of the CET revenue, per code, to Bureau of Development Services for their role in applying the fees and exemptions within building permits and collecting revenue. In addition, 15% of residential CET is remitted to the State of Oregon Housing and Community Services department. The remaining CET is available for affordable housing under specific guidelines in statute.

Staffing: Staffing for the program is 6.15 FTE, one of which is limited-term. With the continuance of the IH Program, it is necessary to continue funding for the limited-term position to ensure sufficient customer service and timely review of applications to not delay building permits.

Assets and Liabilities:	While no City-owned assets are created by the program, affordable housing assets owned by third-parties are created via indirect subsidy (limited tax exemptions and development fee waivers) and regulation (inclusionary zoning code).

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Dory Van Bockel
Website:	https://www.portlandoregon.gov/phb/72626	**Contact Phone**	503-823-4469

Metro GO Bond Multi-Family Rental Housing Project

Program Description & Goals

In 2018 Metro-area voters approved Measure 26-199, the first ever Regional Affordable Housing Bond, which authorizes Metro to issue up to $652,800,000 in general obligation bonds for the development or acquisition of affordable housing. Leading up to the vote, Metro conducted a series of public engagement activities. From those emerged the Regional Investment Strategy (Strategy) for the Metro Bond. The primary goal of the Metro Housing Bond Program is create at least 3,900 new affordable homes, of which:

• At least 1,600 will be affordable to households making 30% of area median income (AMI) or below;
• At least 1,950 will be sized for families, with 2 or more bedrooms;
• No more than 10 percent will be provided for households making 61-80% of area median income.

Multnomah County's share, using a formula based on assessed (real property) value, is roughly 45%. Using AV to allocate funds results in approximately $200M for Portland to create over 1,400 units of affordable housing, serving up to 4,500 people. The program is brand new with no implementation history. As the program rolls out, PHB will track, among other things, dollars spent, units created, and people served.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

PHB as the lead for the Metro Bond program for property in the city of Portland was decided during the planning that led up to the November 2018 ballot measure. The program directly aligns with, and other than program-specific goals, is nearly identical to the city's existing Housing Bond Program: 100% of the units created through the program will serve households earning 60% or less of area median income (AMI). Metro Bond goals for Portland include 605 units at 0-30% AMI (there is no PSH goal currently). Also included in this program is a fund that uses the $4/night short-term rental fee as a source to help subsidize operations of buildings developed using Metro Bond funds, likely in the form of a voucher. While the Portland and Metro Housing Bond Programs are similar in goals and affordability targets, the implementation strategy for the Metro bonds will need to reflect the different types of operating support to achieve those goals.

Equity Impacts

PHB's work with Metro is guided by the following four principles which were derived from Metro's Strategy to Advance Racial Equity, Diversity, and Inclusion and conversations with key stakeholders who participated in a six month public process convened prior to the referral of the Measure:

1. Lead with racial equity;
2. Create opportunity for those in need;
3. Create opportunity throughout the region, including to help prevent displacement in changing neighborhoods where communities of color live today; and
4. Ensure long-term benefits and good use of public dollars.

Metro will be requiring all implementation parties to conduct a robust community engagement planning process prior to the release of funds. Local plans will include strategies to advance racial equity strategies to eliminate barriers in accessing housing for communities of color and other historically marginalized communities.

Changes to Program

PHB's implementation of the Metro Bond program is brand new as the initiative that authorized the bond was passed by voters in November 2018.

PHB anticipates using existing staffing for early implementation of the program. As the program parameters are developed by Metro, PHB will assess the need for additional staff support for finance, legal and program implementation. No operating or rent support has yet been identified for these units. This fund would as currently conservatively contemplated could sustain approximately 100-140 units for 30 years.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	150,000
Internal Materials and Services	0	0	0	0
Personnel	0	0	0	111,151
Sum:	**0**	**0**	**0**	**261,151**
FTE	0	0	0	0.8

Resources: Primary resources for this program are proceeds from the Metro GO Bond. The exact nature of the flow of funds to the City has not been determined at this time.

Expenses: The primary expenses of the program are expected to be disbursements made as part of the financing package for multi-family affordable rental housing projects. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program is 0.8 FTE for the initial planning and projects under the Metro Bond. PHB will utilize its existing executive, community engagement, finance and implementation staff during the early implementation of the bond. These staff collaborate with other bureau staff and the City Attorney's Office.

Assets and Liabilities: At this time, the nature of this program would finance capital assets owned by other non- governmental entities through loans. These assets are represented on financial statements by loan receivables (for which a property lien would be held), The value received by this figure is the units developed using these loans. The capital assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland. However, the financial relationship between the City and Metro has not been fully defined, especially in terms of assets and liabilities.

Program Information

Bureau: Portland Housing Bureau

Website:

Program Contact: Karl Dinkelspiel

Contact Phone 503-823-1354

Multi Family Affordable Rental Project Financing

Program Description & Goals

The Multi Family Rental Project Financing program manages large investments in the City's new affordable housing portfolio to ensure affordable housing units are brought on-line and available in a most practicable manner. The multi-family delivery team, working through its partners, leverage City resources to develop new construction that deliver quality, affordable housing units which are rent regulated long term, up to 99-years.

The team is also responsible for any restructures and rehabilitations of the Bureau's prior investments. The regulated affordable rental housing portfolio consists of approximately 400 properties with over 13,000 units spread throughout the City. While creating new affordable housing units is critical, it is just as crucial to maintain the existing affordable stock. As with new construction, the team seeks to leverage existing resources, including those from the City, to redevelop projects and improve the quality and habitability of existing units and in many cases extend the City's regulatory terms.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Vacancy rate of units built 0% to 60% median family income	3%	3%	3%	3%	3%
Housing units opened that are newly affordable	511	804	828	500	500
Affordable housing units preserved	145	183	150	150	150
Rolling three-year average of total units opened and preserved	471	688	861	714	700
Average investment per rental housing unit	$110,000	$100,000	$110,000	$110,000	$110,000
Percentage of housing units opened or preserved in high opportunity areas	73%	60%	50%	50%	50%
Percentage utilization of minority, women, and emerging small business contracts in housing contruction (contract $ awarded)	21%	20%	20%	20%	20%
Percentage utilization of minority contracts in housing construction (contract $ awarded)	14%	12%	15%	15%	15%

Explanation of Services

The Multi Family Rental Project Financing program seeks to address, in-part, the City's housing crisis and the need for affordable rental homes. It also provides housing needs to the low-income households, earning 60% of the Area Median Income (AMI) or about $48,840 for family of 4, and to very low-income residents earning 30% AMI or less, many of whom are at-risk of homelessness. Housing produced under this program are regulated for a minimum of 60 years (policy target 99 years). In addition, the restructures of regulated units retain the affordability and habitability of existing affordable housing projects.

This program provides the needed City investments to enable affordable housing projects to be developed by non-profit and for-profit partners. PHB financings, for the most part, are awarded through a Notice of Funding Availability (NOFA) to ensure that projects awarded with the City's subsidized funding are through a transparent, widely-accessible, public process. PHB issues 1-2 NOFAs each year and awards 5-10 projects for funding per year. Each NOFA will have specific requirements including a) the targeted population served, such as those at-risk of homelessness, b) the income requirements including those at 0-30%, c) unit size and location and d) equity in contracting and in the program delivery.

PHB's funded portfolio is expected on average to have 20 requests for rehabilitation, restructures, and modifications each year; since each project is expected to require major rehabilitation or refinancing every 15-25 years . And as the affordable housing portfolio increases, requests of this nature are expected to increase. In some cases, restructures will require additional PHB funding as well as a new tax credit partnership. The PHB analysis and approval process is like that used for new construction projects.

FY 2018-19 continues to be an exceptionally busy year for PHB and this team with 26 projects in construction or in the development pipeline representing over 2,100 units which is over four times the annual production levels required under the 2035 Comp Plan.

Equity Impacts

It should be noted that all PHB programs seek to address equitable outcomes. In particular for this program, PHB development partners are required to report on their efforts to provide contracting opportunities to minority, women and emerging small business (MWESB), and must comply with federal and local low-income workforce utilization goals.

PHB has a well-documented history of supporting equity and inclusion in contracting. Since its inception, the Bureau has met or exceed the City of Portland's goal of 20% Disadvantaged, Minority, Women and Emerging Small Business (DMWESB) for construction sub-contracts. In July of 2016, PHB committed to a goal of 30% DMWESB participation by the year 2021 by implementing annual 2% target increases for all multi-family funded projects. Through a concerted outreach effort, the Bureau also has supported workforce training and hiring goals.

Of the 2100 affordable housing units in production, a total of 583 units or 27% (143 in construction and 440 in pipeline) are in the Interstate Corridor Urban Renewal Area subject to the N/NE Preference Policy which seeks to address historic displacement and the impacts of gentrification.

Changes to Program

It continues to be a pivotal time for the PHB for many reasons. First, the declaration of a continued housing emergency and the surge in resources; first from the increased allocation of the Tax Increment Financing (TIF) set-aside for housing in 2015, then the passage of the City's General Obligation (GO) Bonds in 2016. Most recently in 2018, the voters approved the Metro Bond and a constitutional amendment allowing the use of GO bond funds with more traditional affordable housing finance methods. The Bureau is already working through an extensive pipeline of new housing projects and the influx of additional funds is likely to lead to increased community expectations.

To meet the 2035 Comprehensive Plan goals, the Bureau has exceeded the Comp Plan production target of 500 newly affordable units a year and is on track to reach the overall goal of producing at least 10,000 new regulated affordable housing units on or before 2035.

In conjunction with the lack of affordability, cost of construction has skyrocketed, increasing at 8-12% per annum over the past 2-3 years, making the creation of new affordable units much costlier than previously projected and the impact of construction delays costlier.

Due to the increased level of homelessness and the need for permanent supportive housing (PSH), City Council sought to address this crisis by passing a resolution to provide 2,000 units of PSH units over the next 10 years. The City's efforts are a collaboration between the Bureau and the Joint Office of Homeless Services (JOHS) which has been working together to increase PSH units in affordable housing supported by Bureau funds for both development of units and services for those units.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	63,919,635	17,913,870	12,175,000	6,855,000
External Materials and Services	23,958,844	44,332,313	75,951,614	49,958,565
Internal Materials and Services	38,797	53,727	353,000	85,000
Personnel	749,240	675,206	1,372,094	966,829
Fund Expense				
Contingency	0	0	359,767	0
Debt Service	37,178,291	10,370,699	388,703	0
Fund Transfers - Expense	1,089,473	0	3,938,600	0
Ending Fund Balance	2,133,920	4,549,969	0	
Sum:	**129,068,200**	**77,895,785**	**94,538,778**	**57,865,394**
FTE	5.42	5.62	7.03	6.84

Resources: The Multi Family Rental Project Financing program has a wide range of funding sources that pay for project financing and staff. Traditionally, the primary source has been the TIF housing set-aside that directs up to 45% of all TIF expenditures to affordable housing per City policy. Federal funds such as CDBG and HOME are another traditional source for multi-family project financing. Local funding has increased significantly in the last three years, with the City and County both contributing General Fund resources via the Housing Investment Fund (HIF). In addition, City Council added a Construction Excise Tax (CET) dedicated primarily to multi-family development.

TIF funds for multi-family housing are currently riding the crest of a wave of resources created by the increase in housing set-aside in 2015. As forecast by both the Bureau and Prosper Portland over the last few years, TIF funding will subside over the next four years as almost all districts reach maximum indebtedness or the final year to issue debt. That would leave CET as the only source of local funding (excepting bond resources, addressed in other program offers) to go along with federal sources (which have dwindled significantly from 15 years ago, but have stabilized more recently. While the emphasis on multi-family project financing will shift from this program to bond programs over the next five to seven years, by FY 2026-27 will be reliant other local funding sources to be place to maintain this program at current levels.

Expenses: Almost all program expenditures are disbursements made as part of the financing package for multi-family affordable rental housing projects. PHB lends the resources listed above to make up a financing “gap” typically found with affordable projects. These gap funds cover the difference between the equity a project attracts and the money that can be borrowed against the project as part of the financing package.

For FY 2019-20, the amounts appropriated are either a) projects under construction, b) projects with a legal funding commitment, or c) projects for which funding has been awarded. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program consists of 6.84 FTE (including an additional Senior Housing Loan Coordinator being added with existing resources), who spend an estimated 70% of time on developing new affordable rental housing and about 30% on restructuring and modifications of affordable housing projects. This team collaborates with other bureau staff and the City Attorney's Office in getting project financing delivered. The same positions working in this program also are working on the bond programs.

Assets and Liabilities: This program finances capital assets owned by other non- governmental entities through loans. These assets are represented on the City's financial statements by approximately $438 million of gross loan receivables (for which the City holds a property lien), which is primarily soft debt, thus the net receivables are closer to $60 million. The value received by the City by the difference in the gross and net figures is the approximately 400 properties with over 13,000 units developed using these loans. These assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland.

Both PHB gap-financed and owned apartment buildings are required to have asset management plans and replacement reserves. For the gap financed projects, the bureau has an Risk Assessment and Compliance (RAC) team that reviews regulatory agreements for compliance with asset management requirements, grant funding requirements, and in some cases financial condition. In addition, physical condition inspections are done by construction coordinators as requested by the RAC team.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Jill Chen
Website:	https://www.portlandoregon.gov/phb/74263	**Contact Phone**	503-823-3339

Portland GO Bond Multi-Family Rental Housing Proje

Program Description & Goals

In 2016 Portland voters approved Measure 26-179, Portland's Housing Bond, which authorizes the City to issue up to $258,400,000 in general obligation bonds for affordable housing. PHB plans to use the GO Bond proceeds to develop new affordable housing and purchase non-regulated occupied rental housing. The priorities and goals established by the bond's Policy Framework are guiding how PHB identifies, purchases, builds and renovates homes. The policies and goals in place regarding how to use the bond funds are to:

• Build or acquire 1,300 or more affordable housing units, of which 650 of the bond funded units be "family-sized," i.e. two or more bedrooms; and at least 600 units will be for households earning 30% or less of area median income (AMI), 300 may be supportive housing for households experiencing homelessness.
• Create access for Priority Communities, identified as:
Communities of Color;
families, including families with children, immigrant and refugee communities, families with foster children and intergenerational households; households experiencing homelessness or at imminent risk of becoming homeless; and households facing imminent displacement.
• Develop throughout the city, priority given to locations where there is: little or no existing affordable housing opportunities;
high risk of gentrification, especially with large concentrations of communities of color; and
good access to education, transportation, services, economic opportunities and green spaces.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

At the time of passage of the authorizing Measure, Oregon's Constitution prohibited GO Bond funds from being lent to artificial third-party entities, preventing the ability to utilize private ownership models and financing sources. The Portland Housing Bond program was originally designed in accordance with this restriction. This meant that projects had to be owned by a governmental entity, and that there were limited ways to leverage bond funds. PHB staff first implemented the program in the context of this reality, funds being used to acquire existing rental apartment projects and vacant land that will be redeveloped with affordable housing.

This model differs from the one typically used by PHB, where the Bureau lends resources to make up a financing "gap" typically found with affordable projects. These gap funds cover the difference between the equity a project attracts and the money that can be borrowed against the project as part of the financing package. Without the city's gap financing, projects would not have sufficient funding to get built.

Equity Impacts

As with all PHB programs, the Housing Bond serves low-income people, many of whom are people of color and people with disabilities. For the Housing Bond properties, PHB has made a concerted effort to serve those with the highest needs, who may have barriers to access housing in the private market. For the Ellington and 10506 E. Burnside buildings PHB developed and implemented leasing programs specifically targeted to reach these communities. Aspects of the leasing program included:

• 0-30% AMI units – referrals through the Homeless Family System of Care (led by the nonprofit JOIN.) The family system is funded by the City/County Joint Office of Homeless Services.
o A subset of the 0-30% AMI units are dedicated as Supportive Housing, with wrap around services.

• 60% AMI units – when vacancies occur, property management sends out an "advance notification" to the community agency partner list. Agencies have a 14-day window to make referrals of eligible households. The list is comprised primarily of housing focused organizations serving culturally specific communities and homeless families.

All these organizations are either culturally-specific or have significant culturally-specific programs. In addition, PHB acquired the Westwind Apartments in part to ensure that the highly vulnerable tenants there were not displaced.

PHB has a well-documented history of supporting equity and inclusion in contracting. Since its inception, the Bureau has met or exceed the City of Portland's goal of 20% Disadvantaged, Minority, Women and Emerging Small Business (DMWESB) for construction sub-contracts. In July of 2016, PHB committed to a goal of 30% DMWESB participation by the year 2021 by implementing annual 2% target increases for all multi-family funded projects. Through a concerted outreach effort, the Bureau also has supported workforce training and hiring goals.

Changes to Program

On November 6, 2018, voters changed the Oregon Constitution to allow for the lending of GO Bond proceeds for the creation of affordable housing. This is a notable change to the program that will mean that PHB can return to its typical public-private partnership model for the creation of affordable housing. This will also mean that PHB may reconsider the disposition and ultimate ownership of the properties already acquired under the Bond program.

PHB expects that by the first half of FY 2019-20 the planning for this potential transition will be complete. Regardless of the latitude the 2018 Constitutional Amendment provides, PHB is still bound to meet the goals laid out in the Framework and the original Measure. PHB expects that rather than the bureau creating the units as would have happened in the pre-Constitutional amendment environment, those obligations will be implemented by PHB's partners.

PHB will lend some or most of the remainder of Housing Bond funds to private partners. PHB's experience lending TIF and federal funds suggests that private partners will be able to leverage major sources of outside funding especially federal Section 42 Low Income Housing Tax Credit (LIHTC) equity and conventional construction/permanent debt. These sources can make up anywhere from roughly one-third to two-thirds of project financing. PHB expects this will stretch Housing Bond funds further.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	650,000
Internal Materials and Services	0	0	0	481,313
Personnel	0	0	0	553,710
Sum:	**0**	**0**	**0**	**1,685,023**
FTE	0	0	0	4.25

Resources: Primary resources for this program are proceeds from the Housing GO Bond. Some bond related costs that are not bond reimbursable are paid from the Housing Investment Fund.

Expenses: The primary expenses of the program to date have been the acquisition of apartment properties. This acquisition activity will now shift to disbursements made as part of the financing package for multi-family affordable rental housing projects. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program consists of 4.25 FTE (including a portion of an additional Senior Housing Loan Coordinator being added with existing resources), who collaborate with other bureau staff and the City Attorney's Office in getting project financing delivered. The same positions working in this program also are working on the Multi Family Rental Project Financing program.

Assets and Liabilities: A number capital assets have been purchased to date through the Portland Housing Bond program, through a combination of the Housing GO Bond, the Short-term Rental Revenue Bond, interim borrowing, TIF and Housing Investment Fund sources. These assets include the following apartments:

- The Ellington
- East Burnside
- The Westwind

Other assets include property planned for future development:

- 30th and Powell
- Mt Tabor
- The Joyce
- NE Prescott

As aging existing apartment properties, the Ellington and Westwind have significant future major maintenance expenses. Property management costs for all properties can be found in the Property Management program offer, along with further discussion of asset and liability issues for these properties.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Karl Dinkelspiel
Website:	https://www.portlandoregon.gov/phb/74262	**Contact Phone**	503-823-1354

Property Management

Program Description & Goals

PHB currently owns 15 pieces of real property. Properties fall into four categories: land leases for affordable housing development; housing owned by the Bureau; properties under development; and properties planned for future development.

• Land Leases: Three properties are land under long term (up to 99 years) ground leases for affordable housing development. Lessees are responsible for operations and maintenance of the land.

• Housing Bureau Owned Properties: The Housing Bureau owns five rental properties – the Fairfield, the Ellington, 105 E Burnside, the Westwind and the Headwaters. Home Forward asset manages these buildings on PHB's behalf.

• Properties under active development: Two properties are under active development by PHB – a new development at 30th & SE Powell, and the Joyce Hotel renovation and rehabilitation. PHB is responsible for the property management for these parcels.

• Properties for future development: The bureau owns five properties which will be available for future affordable housing development on varying timelines due to current occupancy – 5020 N. Interstate Ave., 5827 NE Prescott, 60th & Belmont, 102nd & E Burnside, and Carey Boulevard Property.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

PHB has a number of responsibilities and requirements as a result of owning property which fit into two broad categories: day-to-day property management and longer-term asset management. Property management includes such activities as tenant services, leasing, maintenance, security and vendor contracting. Properties slated for future development are managed by PHB staff. PHB has leveraged the capacity and expertise of Home Forward to asset manage its occupied rental properties.

Equity Impacts

In keeping with PHB's broader mission, the property management/asset management program supports the provision of affordable housing either through direct ownership of property or through leasing of property to mission-based partners. PHB requires that all units are made available to households earning 60% AMI or less. Disproportionately, these are households of color or households with disabilities. PHB's selection criteria for partners typically include an emphasis on culturally specific services and/or outreach during lease-up. PHB actively assists non-culturally specific partners in creating and fostering partnerships that help disadvantaged communities.

Changes to Program

Prior to 2016, PHB properties were asset managed by Prosper Portland under the terms of an IGA. From 2016 to 2018 PHB managed its own properties. In 2018, recognizing the bureau lacked capacity to asset manage its expanding real property assets, PHB entered into an IGA with Home Forward to provide asset & property management services.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	98,302	408,506	3,852,093	5,583,517
Internal Materials and Services	14,206	-12,185	56,928	165,472
Personnel	0	64,036	182,133	7,099
Fund Expense				
Contingency	0	0	2,750,222	314,418
Debt Service	0	0	2,097,197	712,750
Fund Transfers - Expense	0	0	15,000	0
Sum:	**112,508**	**460,358**	**8,953,573**	**6,783,256**
FTE	0	1.57	0.22	0.06

Resources: Acquisition of these properties utilized many funding sources: TIF, HIF, various bond proceeds, and interim financing. Operations and maintenance of the properties is covered primarily by property income (rents); though holding costs for a couple are covered by TIF, and the bureau is subsidizing two others from HIF sources. In FY 2019-20, one-time and ongoing funds were added o support drug and alcohol treatment services as part of permanent supportive housing services.

Expenses: Current expenses are the operations and maintenance of the properties. These expenses can include major maintenance items that are not capitalized.

Staffing: PHB has spread staffing responsibility for this program among the Affordable Rental Housing, Bond and Business Operations teams. This consists of approximately 0.06 FTE dispersed over a number of individual staff.

Assets and Liabilities: These property assets have a value of approximately $90 million. These properties vary in need from major rehabilitation to major maintenance to construction. Newer properties like the East Burnside and Headwaters apartments have time to build maintenance reserves, while older properties like the Ellington may need additional financing to address major maintenance issue. Both Housing Bureau gap-financed and owned apartment buildings are required to have asset management plans and replacement reserves. For PHB-owned buildings, property management contractors are required to provide multi-year capital needs assessments for review by bureau staff, and Home Forward advises on proper replacement and capital reserve amounts.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Karl Dinkelspiel
Website:	https://www.portlandoregon.gov/phb/26428	**Contact Phone**	503-823-1354

Homeowner Access Programs

Program Description & Goals

The Portland Housing Bureau's (PHB) Homeowner Access program invests in services to assist families, particularly from communities of color, access homeownership. Support for low income, first-time homebuyers includes pre-purchase education and counseling as well as down payment assistance programs. Services are administered by PHB's Neighborhood Housing Program (NHP) staff along with partnerships with nonprofit community service providers.

Through the following program service delivery models, the goals of the Homeowner Access program include, but are not limited to - increasing the number of new homebuyers, addressing racial homeownership disparities, providing generational wealth creation opportunity, prioritizing households and families displaced by gentrification and improving financial stability for City of Portland residents. The following service delivery models make up the Homeowner Access Program.

- Homeownership education and counseling
- Down payment assistance (DPA)
- Homeownership development

Homeownership education and counseling services are provided by HUD Certified Community Partners by way of sub recipient contracts with the Bureau. Culturally specific educational courses are provided to households working towards purchasing a home, along with one-on-one counseling that provides case-by-case analysis of the household's unique circumstances with support through the entire homeownership process. Partnerships with non-profits create additional opportunities for homebuyers to access additional programs and leverage other resources that have proven beneficial in becoming a successful homeowner.

Down Payment Assistance (DPA) loans and grants are administered directly by PHB staff, and act as a means by which the Bureau impacts housing affordability, with a subsidy that reduces the costs of the home purchase, therefore reducing the monthly financial obligations to the household. DPA has proven to be an essential tool in providing access to affordable homeownership opportunities and support permanent affordability.

FY 2017/18 and 2018/19 resources for DPA in the Interstate Urban Renewal Area (URA) have been dedicated to new homeownership development initiatives to address the City's increased housing prices and low housing stock.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of households receiving homebuyer education or counseling	975	1,169	975	975	975
Percentage of households receiving homebuyer education or counseling and subsequently purchasing a home	15%	13%	10%	10%	10%

Explanation of Services

Creating additional homeownership opportunities is one of a few tools necessary to support the housing continuum, providing a pathway from homelessness to homeownership options in the market. Renters have been faced with increasing rents and rising living costs, while incomes haven't met that same level of growth – homeownership provides a stabilized, long term affordable housing option.

In a very competitive and tight housing market, creating new homeowners continues to be a challenge; however, homeownership counseling and education through reputable and trusted community partners help to 1) identify residents with a desire to improve their financial wellbeing and 2) provide necessary education that is culturally appropriate, based on the various history and views of Portland residents.

DPA subsidies are available in the form of a forgivable loan to first time homebuyers at or below 100% AMI. Total per household subsidies have recently increased in the Interstate URA to $100,000 to address the higher priced market in the area, which necessitates a greater subsidy to allow families who make 100% of median family income purchase homes in the area. The total DPA subsidy for other area of the City are capped at $80,000 per household. TIF resources require that 20% of the subsidy are designate for use as a Home Improvement grant to be used within 6 months of closing.

In 2018, City Council approved new DPA guidelines which allow for loan forgiveness. Under the DPA loan forgiveness structure, 50% of the original loan amount is forgiven on the 15th anniversary of the original loan note. Three percent of the original loan amount will be forgiven annually on the anniversary date of the original loan note, starting year 16 and continuing until year 29. At the end of year 30, any remaining balance will be forgiven. A home sale or refinance prior to year 30, will require a payoff of any remaining balance on the loan.

Equity Impacts

Communities of color continue to face significant challenges in becoming homeowners; factors such as limited to no generational wealth, impacts from generations of disinvestment in communities resulting in credit and debt challenges, and most importantly communities of color continue to earn less than their white counterparts here in Portland and Multnomah County. The Homeowner Access Program's main goal is to assist low income and people of color to become homeowners through counseling assistance and down payment assistance. PHB contracts with several culturally specific organizations to provide both counseling and the down payment assistance programs.

Down payment assistance is necessary in addressing the homeownership disparities, and policies should improve access and lessen challenges and barriers in obtaining resources.

Changes to Program

In December 2017, Council unanimously approved the Home Purchase Assistance Program (HPAP). HPAP provides assistance that is directly funded by the first mortgage lender. The lender is reimbursed for the assistance, which is wrapped up in a silent second loan (forgiven pro rata over 10 years), by selling them to a third-party program administrator, George K Baum (GKB). The lender is also reimbursed for the 1st mortgage by selling it to either their Servicer or Freddie Mac directly. The Freddie Mac piloted program allows for a 1% fee (of the purchase price) to be charged on each loan. This fee is split 50/50 between PHB and GKB. PHB pays for staff time related to managing the program, however the program may generate revenue that can be used for Housing Bureau programming. This is a program that is new to the Neighborhood Housing list of services.

PHB Interstate TIF homeownership financial assistance is subject to the Preference Policy Potential homeowners must be identified through the PHB Preference Policy to gain access to Down Payment Assistance (DPA) resources in the ICURA. This creates a significant challenge in reaching the homeownership goals stated in the N/NE Neighborhood Strategy plan, as PHB and community partners work to serve and prepare marginalized communities which have decades of disinvestments.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,734,400	1,885,767	8,546,959	3,777,848
Personnel	56,195	161,295	122,600	235,715
Sum:	**1,790,595**	**2,047,062**	**8,669,559**	**4,013,563**
FTE	0.66	0.93	1.67	1.85

Resources: Funding sources for Homeowner Access Programs include federal funds (Community Development Block Grant, which has income and usage limitations); and Tax Increment Financing (TIF) in the Lents and Interstate urban renewal districts (which are limited by location to the districts and require a small construction component).

Expenses: As some of these programs involve direct service, staffing costs as a ratio of funds disbursed to citizens tend to be higher than multifamily programs. But funds disbursed via subrecipient contracts and loans are still the primary expense of the program.

Staffing: The different service delivery models require different skill sets within the team. Subrecipient contract with community partners require contract development, management, and monitoring. DPA loans require coordination with community partners to identify potential buyers, income qualification and loan origination, and where a home improvement grant is paired with a DPA loan, construction coordination. There are 1.85 FTE dedicated to this program.

Assets and Liabilities: This program assists in financing the acquisition of homes by citizens, owned by those citizens through DPA loans. These are deferred payment loans, but the bureau holds liens on the properties, and loans are due upon change of occupancy. For loans originated after 2015, the forgiveness model described under explanation of services is in effect. Data indicates that many loans are paid off within the first 15 years, though since the DPA program is barely 15 years old, that trend will need to be monitored. The value received by the City for those loans not yet paid off is the benefit of a new homeowner, which represents a significant and critical component in the affordable housing resources available to the residents of Portland.

Program Information

Bureau:	Portland Housing Bureau	**Program Contact:**	Dana Ingram
Website:	https://www.portlandoregon.gov/phb/74630	**Contact Phone**	503-823-2375

Homeowner Retention Programs

Program Description & Goals

Homeowner Retention programs are City investments available to assist families, particularly from communities of color, retain homeownership. Through direct loan origination and sub-recipient contracts, homebuyers receive post-purchase education and counseling as well as grants and loans.

The program serves to prevent displacement of long-time community residents by helping current homeowners retain their homes through home repair programs, foreclosure prevention counseling, and retention services. Funding for home repair grants and loans helps current low-income, vulnerable homeowners maintain their homes safely. Grant and loan programs are meant to improve the condition of existing housing and address the impact that housing conditions can have on health and safety. Lead remediation and healthy homes programs include administration of federal funds to reduce lead-based paint and environmental health hazards in homes with young children or vulnerable elderly occupants.

Loans (administered by PHB) and grants (community partners) aim to help older adults and people with disabilities retain and live safely in their homes through home repair assistance.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of households receiving home repairs	586	721	800	600	600
Percentage of households receiving home repairs and retaining their homes 12 months after services	88%	80%	80%	80%	80%

Explanation of Services

Homeowners in the City of Portland are experiencing poor property conditions resulting from deferred maintenance and long-term residents have experienced rapidly increasing property taxes. Elderly residents are at risk of displacement when incomes are reduced, and medical expenses are increased, finding it more difficult to age in place and pass on generational wealth.

New homeowners are stretched to afford home purchases in the City, therefore post purchase counseling, fix it fairs, financial fitness workshops, etc, provide the support and information to help homeowners maintain their homes, and provide proactive resources, and set expectations.

Home Retention Case Management services aim to preserve homeownership and prevent foreclosure. The program is available for new and longtime homeowners at or below 80%AMI, and provide support, counseling and referral services. NHP is working to enhance and build upon existing relationships with other bureaus such as Bureau of Development Services (BDS) to address housing code violations. Recently, $200,000 was set aside to enhance the program's effectiveness, to provide additional services such as estate planning, loan modification counseling, financial planning, etc.

Foreclosure Prevention Counseling services offered through two nonprofit culturally specific agencies provide HUD-approved housing counselors available to assist in avoiding foreclosure.

Home Repair Grants utilize Bureau funding to support Community Partners with outreach, administration, and direct operational expenses. Homeowners receive small grants to address critical needs, health and safety issues, such as weatherization materials, accessibility features, wheelchair ramps, etc, and addresses BDS fines. These services are delivered through 8 nonprofit community organizations through sub-recipient contracts with the following resources: Tax Increment Financing (TIF) in the Interstate and Lents Urban Renewal Areas (URA's) and N/NE resources, General Fund (GF), and Community Development Block Grant (CDBG) (limited to $5,000). On average, homeowners receive a grant amount of approximately $2,000. Home repair grant partners provide these services to homeowners below 80% AMI, with a target of servicing households at 50% AMI and lower.

In cases where a grant doesn't cover the necessary repairs, Home Repair Loans, are available for homeowners in the City; administered by PHB's NHP Loan Coordinator. Home Repair loans are capped at $40,000 per home, have an income limit of 80%AMI.

PHB will continue to administer Prosper Portland N/NE Community Development Initiative resources to help moderate income households (80% AMI to 120% AMI) purchase and retain homes within the Interstate Urban Renewal Area.

Equity Impacts

Through several activities, PHB assists low income minorities and seniors stay in their homes, for example, by funding foreclosure prevention, and a new program to provide case management to assist families in keeping homes within the family. Additionally, PHB funds home repair grants and loans, and lead remediation for families with children under the age of six.

Changes to Program

A change for FY 2018-19 was a reprogramming of $200,000 in CDBG to enhance the effectiveness of the program goals of homeowner retention to provide services like estate planning and financial fitness for home repair loan/grant clients. NHP staff is currently working to design the programs structure with community input. A limited-term was added during FY 18-19 to assist with program workload.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,538,899	3,597,335	3,164,729	8,406,033
Internal Materials and Services	0	0	0	59,800
Personnel	305,112	484,202	579,573	895,701
Sum:	**3,844,011**	**4,081,537**	**3,744,302**	**9,361,534**
FTE	3.59	5.57	4.1	7.85

Resources: Funding sources for the Homeowner Retention Programs include federal funds (Community Development Block Grant, which has income and usage limitations, and the Lead Pant Hazard Control grant); and Tax Increment Financing (TIF) in the Lents and Interstate urban renewal districts (which are limited by location to the districts).

Expenses: As some of these programs involve direct service, staffing costs as a ratio of funds disbursed to citizens tend to be higher than multifamily programs. But funds disbursed via subrecipient contracts and loans are still the primary expense of the program.

Staffing: The different service delivery models require different skill sets within the team. Subrecipient contracts with community partners require contract development, management, and monitoring. Home Repair loans require marketing in the community, income qualification and loan origination, and construction coordination. There are 7.85 FTE dedicated to this program, including the addition of a limited term construction coordinator with existing resources.

Assets and Liabilities: This program assists in financing the repair of homes for citizens. These are deferred payment loans, but the bureau holds liens on the properties, and loans are due upon change of occupancy. Data indicates that many loans are paid off within the first 15 years. The value received by the City for those loans not yet paid off is the benefit of a homeowner remaining in their home, which represents a significant and critical component in the affordable housing resources available to the residents of Portland. Additional assets belonging to the program are equipment used in field testing for the federal Lead-Paint Hazard Control (paid for with grant funding), which are on a regular maintenance and replacement schedule.

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/74652

Program Contact: Dana Ingram

Contact Phone 503-823-2375

Rental Services Policy and Planning

Program Description & Goals

The Rental Services Policy and Planning Program is responsible for data analysis, policy development, and regulation related to fair housing and landlord-tenant law. The program works to develop and implement policy and regulation associated with landlord-tenant and fair housing law. This work includes research, data analysis, and policy development as directed by the Housing Bureau Director, Commissioner-in-Charge, and City Council; staff support to the City's Rental Services Commission and Fair Housing Advocacy Committee; technical assistance for the public to get information and assistance with local landlord-tenant law requirements; administration of the city's mandatory relocation assistance exemption process; and, administration of the city's rental unit registration requirement. There are no program-specific performance measures associated with this program offer.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Over 46% of households in Portland are renters, and renter households are disproportionately low-income or from Communities of Color. When compared with similar jurisdictions across the nation, or the homeownership market, the rental housing market in Portland, and Oregon, is largely missing a modern regulatory framework to maintain a healthy market for both renters and landlords. Renters are experiencing higher rates of displacement due to rising cost of rent and stagnant incomes, and this displacement has created a need for the city to address and modernize its services and regulations.

This program is one of two associated with the Rental Services Office; the city's landlord-tenant and fair housing organization. This program exists to develop and implement policy and regulation associated with landlord-tenant and fair housing law. Some initiatives are consistent year-to-year, but as new initiatives are identified by City Council, the Commissioner-in-charge, or the bureau, they are assigned based on workload and expertise.

This program is responsible for leading the coordination and implementation of Rental Services Office workplan and projects, along with the policy and planning associated with the Fair Housing Advocacy Committee, contract management, rental unit registration, and other high-priority initiatives. Other responsibilities include contract management and mandatory relocation assistance. Moreover, this program is responsible for data analysis, pilot program development and evaluation, and national research and comparative analysis. Other day to day functions of the program are rental registration technical assistance and administrative processing.

The results of the program offer include increased knowledge and understanding of rights and responsibilities for landlords and renters under landlord-tenant and fair housing law; administrative processing of mandatory relocation assistance exemptions and payments; a complete registration of rental units; Tenant-Landlord services contracts; and successful development of policies and regulations as directed by City Council.

Equity Impacts

The Rental Services Policy and Planning Program focuses services on individuals from underserved communities who have barriers to housing and opportunity. This includes having an intentional focus on reaching Communities of Color, immigrant and refugee communities, people with limited English proficiency and individuals with disabilities. Education services are provided in a culturally-responsive manner and several sub-contractors provide culturally-specific rental services Data is collected and reported on a quarterly basis and is disaggregated by race and ethnicity. Program staff analyze data to determine issues and opportunities for improvement to advance more equitable access and outcomes.

Changes to Program

Increasing rents and stagnant incomes for renter households have led to an increase in displacement and an increased demand for technical assistance from the city's low-income renters and Communities of Color. In addition, as City Council has adopted new landlord-tenant regulations there has been an increase in the need for technical assistance and administrative process from renters and landlords.

In the current, 2018-2019 fiscal year 2.0 FTE are funded with one-time general fund. Without continued funding for these staff, the Rental Services Office staff will be reduced by 2.0 FTE, or 40%. These 2.0 FTE provide technical assistance to the public on landlord-tenant law and process exemptions for mandatory relocation assistance. Losing these staff will require the bureau to eliminate these services or cut other services to redirect existing staff

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	160,000
Personnel	0	0	0	246,278
Sum:	**0**	**0**	**0**	**406,278**
FTE	0	0	0	2.04

Resources: The program is funded from primarily General Fund, with some CDBG resources.

Expenses: Program expenses are primarily salaries and benefits for policy and planning staff, as well as payments for consulting, meeting space and materials, printing and distribution, etc.

Staffing: This program offer includes 2.04 FTE. Staff are assigned a portfolio of policy and planning issues (see explanation of services section) and are responsible for the associated work products.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/72622

Program Contact: Kim McCarty

Contact Phone 503-823-5312

Tenant and Landlord Programs

Program Description & Goals

The Tenant-Landlord Program is responsible for services related to fair housing and landlord-tenant law, managing contracts for services with community-based organizations. These services include education and training, legal assistance, fair housing testing, emergency referral services, and emergency relocation assistance for health and safety. A primary focus of these contracted services is to provide access to information about rights and responsibilities, so renters can overcome knowledge and resource barriers to quickly get their housing needs met and barriers resolved. If education services are insufficient, case management and legal assistance are available for issues including eviction, harassment, discrimination, reasonable accommodations.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of renter clients who were provided information and referrals	1,947	2,602	2,250	2,250	2,250
Average number of monthly referrals to affordable housing with OneApp Oregon Application	N/A	408	400	400	400
Number of renter clients provided direct services	371	793	605	605	605

Explanation of Services

Over 46% of households in Portland are renters, and renter households are disproportionately low-income or from Communities of Color. When compared with similar jurisdictions across the nation, or the homeownership market, the rental housing market in Portland, and Oregon, is largely missing a modern regulatory framework to maintain a healthy market for both renters and landlords. Renters are experiencing higher rates of displacement due to rising cost of rent and stagnant incomes, and this displacement has created a need for the city to address and modernize its services and regulations.

The Tenant-Landlord Program supports education and legal services that are provided through community-based contractors with expertise in landlord-tenant and fair housing law.

Education services include: hotlines for landlord-tenant and fair housing law; community trainings and technical assistance provided by culturally specific organizations; community workshops provided by legal assistance organizations; targeted education and training interventions provided by renter's rights organizations; and other activities. Education is offered in a variety of formats including self-advocacy coaching, letter writing clinics, policy committees, and other interventions from legal and non-legal professionals on behalf of renters seeking assistance.

Legal services include: case management and referral services provided by culturally specific organizations and renter's rights organizations; legal assistance and representation provided by landlord-tenant legal assistance agencies and fair housing organizations; fair housing testing and enforcement provided by legal assistance and fair housing organizations; and other activities.

The results of the program include increased knowledge and understanding of rights and responsibilities for landlords and renters under landlord-tenant and fair housing law; resolutions to disputes between landlords and tenants; stabilized housings and the prevention of displacement; and the stable relocation to new housing.

Equity Impacts

The Tenant and Landlord Program focuses services on individuals from underserved communities who have barriers to housing and opportunity. This includes having an intentional focus on reaching Communities of Color, immigrant and refugee communities, people with limited English proficiency and individuals with disabilities. Education services are provided in a culturally-responsive manner and several sub-contractors provide culturally-specific rental services. Data is collected and reported on a quarterly basis and is disaggregated by race and ethnicity. Program staff analyze data to determine issues and opportunities for improvement to advance more equitable access and outcomes.

Changes to Program

Increasing rents and stagnant incomes for renter households have led to an increase in displacement and an increased demand for education services and legal services from the city's low-income renters and Communities of Color. Additionally, as an increasing priority for City Council, the demands and expectations of the program have increased.

Funding for service contracts has nearly doubled in the last two fiscal years, but the increased level of service has been funded with primarily one-time funding. The FY 2019-20 Budget includes one-time resources to maintain current service levels for contracts for outreach, education, and legal services, two existing positions, and a new Rental Services Office program manager. Furthermore, there is additional funding for a mediation services pilot program to help resolve tenant and landlord disputes as an alternative to eviction, and additional funding from one-time Recreational Cannabis Tax resources for records expungement for communities disproportionately impacted by cannabis prohibition.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	1,530,700
Internal Materials and Services	0	0	0	4,000
Personnel	0	0	247,173	397,940
Sum:	**0**	**0**	**247,173**	**1,932,640**
FTE	0	0	2.5	3.5

Resources: The program is funded from both CDBG funding and General Fund ongoing and one-time resources. In FY 2019-20, the budget includes one-time resources to maintain current service levels for contracts for outreach, education, and legal services, two existing positions, and a new Rental Services Office program manager. In addition, there is funding for a mediation services pilot program to help resolve tenant and landlord disputes as an alternative to eviction. Also, there is additional funding from one-time Recreational Cannabis Tax resources for records expungement for communities disproportionately impacted by cannabis prohibition.

Expenses: Program expenses are primarily staff and contract payments for education and legal services. Staffing costs are associated with management of the contracts and operating the Relocation Assistance activity.

Staffing: This program offer includes 3.5 FTE. Staff operate the Relocation Assistance activity, and manage numerous Fair Housing, legal assistance, education and outreach contracts.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Website: https://www.portlandoregon.gov/phb/72622

Program Contact: Kim McCarty

Contact Phone 503-823-5312

District Planning

Program Description & Goals

Area Planning includes the District Planning Program and the Central City Program that work with communities and property owners to influence how the growth and development of districts can contribute to a more prosperous, healthy, resilient and equitable city. These programs advance Portland's goals to increase access to: (1) Healthy connected neighborhoods with adequate housing supply and options; and (2) Resources for commercial development to grow jobs and an equitable low-carbon economy.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Representation of typically under-represented groups in decision-making processes	22%	26%	32%	30%	30%
Level of community diversity retained or achieved as neighborhoods change and grow	N/A	N/A	29%	29%	29%
Acres of ecoroofs in the Central City	20	20	20	25	408

Explanation of Services

The program is organized into two groups: (1) District Planning: This program assigns a planner to work as the generalist planning lead for each of five districts — West, Southeast, North/Northeast and East. District Planners use their expertise on local conditions and interests to work with communities on projects that address development and equity issues related to topics such as zoning, design, housing, environment, transportation and transit. The District Planning group is leading a new interdisciplinary team to review progress on the East Portland Action Plan, increase community engagement in East Portland, and develop a scope for a larger community development and planning effort with community input. (2) Central City Planning: The Central City planning group works closely with communities and stakeholders from the ten vibrant and unique districts that make up the Central City — from Lloyd, to lower Albina, the Pearl, downtown and the South Waterfront. The group implements the Central City 2035 Plan through planning, changes to development codes and guidelines, and consultation with developers, communities, bureaus, and other Central City interests. The group collaborates with other bureaus on Central City projects, with particular attention to transformative change at catalytic sites such as the Broadway Corridor, the Oregon Museum of Science and Industry (OMSI), Green Loop, and Riverplace.

Equity Impacts

With the adoption of new community engagement policies in the 2035 Comprehensive Plan, the District Planning team is recalibrating its work to increase its time engaging with under-represented communities and developing anti-displacement and mitigation strategies. Northeast District staff are facilitating “Community Conversations” to create dialogue between City staff, Neighborhood Association leaders and communities of color. More than half of the City’s regulated affordable housing is in the Central City, largely the result of past development agreements for the River District and South Waterfront, which the Central City team helped negotiate in partnership with Prosper Portland. Through the Central City 2035 Plan, the team restructured the Central City bonus density system to maximize the viability of the Inclusionary Housing ordinance, supporting additional affordable housing production in the Central City. The team is currently working on planning related to the Broadway Corridor, which is also expected to include affordable housing.

Changes to Program

With the adoption of new community engagement policies in the 2035 Comprehensive Plan, the District Planning team is recalibrating their work with the goal of increasing the share of time spent engaging with underrepresented communities, addressing displacement and equitable housing strategies, updating of the Central City Fundamental Design Guidelines, and planning for the development of key catalytic sites.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	118,758	172,223	5,950	169,375
Internal Materials and Services	1,865	1,200	5,000	0
Personnel	762,918	572,919	862,098	1,154,520
Sum:	**883,541**	**746,342**	**873,048**	**1,323,895**
FTE	7	4.73	0	8

Resources: The program is supported primarily by the General Fund, but occasionally manages Metro grant-funded planning projects.

Expenses: Staffing represents more than 95 percent of the budget for the District Planning program. There have been some changes in how this program is budgeted; therefore, prior year actuals may appear to be lower.

Staffing: The program is currently staffed by 8 full time employees, primarily land use planners. Additional limited duration staff are periodically hired to support specific grant-funded projects.

Assets and Liabilities: The program provides a community development and public engagement service and does not operate or own any assets.

Program Information

Bureau: Bureau of Planning & Sustainability

Website: https://www.portlandoregon.gov/bps/73783

Program Contact: Sallie Edmunds

Contact Phone 503-823-6950

River & Environmental Planning

Program Description & Goals

This program is responsible for developing plans, policies, projects, and regulations to protect and improve the health of environmental resources; ensure proper floodplain management; and contribute to the work of other bureaus and agencies with river and environmental planning expertise. The program is also responsible for developing plans for the Willamette River that meet State mandates and advance multiple and sometimes competing objectives such as natural resources, economic development, river recreation, water quality and other goals. The program also works to develop tools to help ensure floodplain resiliency in the face of climate change.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of significant natural resources protected through non-regulatory and/or regulatory measures	83%	84%	83%	83%	90%

Explanation of Services

The program is organized into three teams:
(1) Willamette River Planning: River planning includes planning for future development; parks; natural, scenic and cultural resources; and transportation. The program recently completed a plan for the Willamette River in Portland's Central City as part of CC2035, which includes a new regulatory structure that strengthened natural resource protection, loosened use restrictions in parks, and streamlined the regulations overall. The program is currently in the process of developing a similar plan for the south reach of the Willamette, the area south of the Ross Island Bridge to the boundary of Portland's planning authority. The program also assists other bureaus and programs including the Office of Government Relations' Tribal Relations Program, and the Bureau of Environmental Services' (BES) Superfund Program and others.
(2) Environmental Planning Program: The Environmental Planning Program is responsible for citywide and area-specific natural resource inventories and environmental overlay zoning as well as large projects such as the overhaul of the Tree Code. The program is currently in the process of updating the environmental overlay zone maps to be consistent with the newly adopted comprehensive plan. Many of these maps were developed prior to the availability of new mapping technology. The program works collaboratively with other City bureaus and government agencies, community organizations and individuals to ensure the City's watershed and environmental health goals are met, along with goals for livable neighborhoods, a prosperous economy and community equity.
(3) Resiliency Planning: The River and Environmental Planning program is one of the entities that helps with the City's resiliency research and planning. During the development of the Comprehensive Plan, the program recommended reducing development capacity on landslide prone properties. Currently the program is focused on ensuring that floodplain regulations incorporate compliance with the Endangered Species Act and recognize future floodplains based on climate change models.

Equity Impacts

Access to rivers, streams, forests and wildlife is important for a healthy community: lowering blood pressure, decreasing anxiety, increasing physical activity and improving social cohesion. People who experience the greatest disparities in Portland typically have limited access to nature. By protecting and enhancing natural areas throughout Portland's neighborhoods, this program strives for equitable access to these public health benefits. Program work has been focused in the East Portland Johnson Creek floodplain. South Reach staff are working closely with the City's Tribal Relations Director to involve local tribes in planning. Concepts emerging include siting a tribal canoe house, creating a Native American-specific plant that includes first foods, and art that educates people about the history of local native peoples. BPS also played a key role in developing the September 2018 Tribal Summit and Tribal Training. The two existing contracts are with MWESB firms.

Changes to Program

For FY 2019-20, Council approved $100,000 for a new Dark Skies Initiative. This funding will be used for part of an FTE and consultant assistance.
The River Plan/South Reach launched in summer 2018. In January 2019 BPS added a Planning Assistant for six months to help the more senior planners prepare the Discussion Draft. The environmental zone correction project is managed by a City Planner II, assisted by a planning assistant. The floodplain analysis expanded in 2018 to become a regulatory project.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	48,942	10,275	8,400	54,150
Internal Materials and Services	540	1,216	5,000	0
Personnel	323,924	372,251	602,673	671,659
Sum:	**373,406**	**383,742**	**616,073**	**725,809**
FTE	3	4	5	5

Resources: In FY 2019-20, the program is supported by General Fund resources, an interagency agreement (IA) covering 3.0 FTE from the Bureau of Environmental Services, and 1.0 FTE from a Special Appropriations for work on federally mandated floodplain regulation changes.

Expenses: Staff is more than 90 percent of the program budget. Typical projects also require funds for professional service contracts to supplement City staff. Most consultant services in recent years have been grant-funded.

Staffing: The program currently has 5 full time employees. Staffing includes the Supervising Planner for this program and Central City part of the Area Planning program. Staff positions are primarily environmental and land use planners.

Assets and Liabilities: The program provides a regulatory and policy service and does not operate or own any assets.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Sallie Edmunds
Website:	https://www.portlandoregon.gov/bps/50493	**Contact Phone**	503-823-6950

Business Services

Program Description & Goals

This program provides Communications, Technical Services, Finance, People Operations, HR, and Administrative Support to support and accelerate the work of BPS staff. They enhance a high-performance workforce with reliable financial, HR, operations, communications and technical services. They support the Equity and Change Manager by building a diverse workforce and advancing an inclusive and equitable culture with trainings, community building, recruitment, on-boarding and retention. They create accessible materials and build online engagement tools and content to engage Portlanders in creating a more healthy, prosperous, equitable and resilient city.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Levels of Employee Engagement	4.02	4.02	4.02	4.10	4.40

Explanation of Services

Business Services is organized into four internal teams that work with all BPS teams as well as other bureaus and agencies:
(1) Finance & HR: Provides business support in Budget, Finance, Contracting, and HR operations and ensures the bureau runs as efficiently and smoothly as possible. Services include: Budget Planning and Development, Financial Management and Operations including procurements of goods and services, accounting, monitoring and reporting of bureau financial activities, Contract Management, Council Filings, and HR support .
(2) Operations & People Services: Provides administrative and operational support; maintains a high level of staff engagement; recruits a diverse workforce and creates an inclusive and high-performance workforce through training and on-boarding; leads activities related to equity, inclusion and community building. Services include: facilities, security, transportation, petty cash, employee travel, database management, data entry, printing and copies, archiving. New staff on-boarding, training, strategic HR, internal equity & inclusion initiatives, management team facilitation.
(3) Media Relations, Strategic Communications & Design: Transforms technical information and data into compelling materials to engage Portlanders in planning the future of the city and helping Portland reach climate action and sustainability goals. Services include: Produces newsletters, blog posts, graphic design of print and digital materials, talking points, media relations and editorials, BPS e-news, social media, web updates, video/audio storytelling, translations.
(4) Technical Services: Provides GIS services, database services, web design and web application development to help Portlanders understand and engage in the process of change throughout the city, to support BPS programs, and help BPS do research and analysis on demographic and economic trends. Activities include: spatial analysis, web application development, and support for Map App and Public Testimony Reader, PortlandMaps, and Mapworks, database design and development, and the design of the City's website refresh (POWR).

Equity Impacts

The BPS Workplace Excellence Program tracks the diversity of the workforce, reflecting recruitment and retention efforts for employees of color. They provide increased training for staff and recruitment of a more diverse workforce that reflects the community BPS staff serve and enhances the engagement experience for the community. The BPS Language Access Team works with the outreach staff to meet the requirements of Americans with Disabilities Act (ADA) Title II and Civil Rights Title VI through translated materials, childcare, and interpretation services.

Changes to Program

A new Business Operations Manager position oversees internal services as well as the Equity program, filling the capacity lost when the previous Chief Sustainability Officer left BPS. A new Communications Director will supervise the 1.5 graphic designers, as well as communications staff. Graphic design, communications, and database development positions were reduced by 0.5 FTE each. The addition of a People Services Coordinator has increased capacity for internal equity and inclusion work as well as strategic HR and community building.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	4,223	1,085	46,252	365,713
Internal Materials and Services	385,600	1,228,822	1,500	1,415,002
Personnel	771,990	744,073	891,169	1,770,434
Sum:	**1,161,813**	**1,973,981**	**938,921**	**3,551,149**
FTE	8	8	16	16.9

Resources: The program is supported primarily by bureau overhead, split between Solid Waste Management Fund and the General Fund.

Expenses: Staffing represents most of the budget for the Business Services program. The communications team also has minimal funding for professional services, and the operations and technology services budgets include funding for technology, equipment, and administrative and office supplies. Due to budget structure changes being implemented in FY 2019-20, this functional area has not been historically budgeted; therefore some prior year actuals are not available.

Staffing: The program is currently staffed by 16.9 full time employees including administrative, finance, communications, operations, HR, graphic design, web and GIS analysts.

Assets and Liabilities: The program maintains the operation of the bureau's electric vehicle and e-bikes.

Program Information

Bureau: Bureau of Planning & Sustainability

Program Contact: Donnie Oliveira

Website: http://www.portlandoregon.gov/bps

Contact Phone 503-823-0229

Director's Office

Program Description & Goals

The BPS Director provides leadership and oversight for the 10-person Leadership Team (LT), staff, and the Planning and Sustainability Commission (PSC) to create alignment in support of BPS's goal to create a prosperous, healthy, resilient and equitable city. The Equity & Change Manager (ECM) oversees the design and implementation of the BPS Equity Roadmap. The teams collaborate on the bureau's racial equity goals to create an inclusive culture, a diverse workforce and measurable equity results through trainings, discussion forums and racial identity caucuses.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Amount of public testimony received by the Planning and Sustainability Commission (in person, via the MapApp or otherwise in writing)	979	2,721	2,721	2,700	2,700
Percent of employees that attended at least one equity-related training per year	N/A	98%	98%	100%	100%

Explanation of Services

This program is organized into three teams:
(1) Director: Provides executive-level management of a large workforce, advancing equity and inclusion practices, municipal government including policy development and implementation, tracking outcomes, budgeting, and asset and personnel management. This position works closely with City Council and stakeholders to advance the Portland Plan, 2035 Comprehensive Plan, the Climate Action Plan, and other significant community-driven priorities. The Director also leads strategy development and builds collaborative systems to drive community action with movement towards equitable land use, climate action and racial justice.
(2) Equity & Change Manager: Provides technical guidance and leadership for equity, diversity and inclusion-based initiatives. Works with other City bureaus and community partners to strengthen policies and practices to advance the City's racial equity goals and programming to address systemic and institutional racism. Manages organizational change for BPS becoming an anti-racist organization through continuous skill-building opportunities for staff and stakeholders.
(3) Planning and Sustainability Commission (PSC): Staff supports the PSC duties of stewardship, development and maintenance of the City's Comprehensive Plan, Climate Action Plan and Zoning Code. Works with the 11 volunteers to balance and optimize the goals of the community as they develop recommendations to share with City Council.

Equity Impacts

The BPS five-year Racial Equity Plan has committed to:
(1) Advancing an Inclusive and Equitable Organizational Culture — Developing staff capacity through trainings: Communicating with Distressed Individuals; Interrupting Micro-aggressions; Policy Link; Government Alliance on Race and Equity (GARE) and Facing Race national conferences; Dismantling Institutional Racism (required for all new hires); Equity Outcomes; Transgender Communities 101; FHCO History of Displacement Bus Tour.
(2) Creating Measurable Equity Results for Communities of Color — Three new learning cohorts that build technical analysis for land use and climate justice work: Equity Outcomes Cohort (2018-2019), Results Based Accountability Cohort with OEHR (2019), Policy Link's All Cities Anti-Displacement Network, (2018-2019).
(3) Accommodations — The Equity and Change Manager consults with Language Access Teams to meet the requirements of ADA, Title II and Civil Rights Title VI requirements. PSC meetings are broadcast online and cable access for community members who cannot attend in person.

Changes to Program

The BPS Director retired in September 2018, and a new director began in FY 2018-19. When the previous Equity Manager left last year, BPS raised the classification from a management analyst to a senior management analyst and began an internal recruitment for 0.25 FTE equity consultants to create a supportive cohort for the equity manager.
The BPS Leadership Team welcomed three women of color in 2018 and funded three technical analysis learning cohorts to study equity outcomes, Results Based Accountability and anti-displacement efforts.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	88,469	100,568	90,273	75,850
Internal Materials and Services	2,871	2,628	0	0
Personnel	389,800	431,512	381,485	418,916
Sum:	**481,140**	**534,708**	**471,758**	**494,766**
FTE	2	2	2	2

Resources: This program is funded by bureau overhead and ongoing General Fund.

Expenses: Primary expenses of the program are staff salaries and benefits. Additionally, PSC expenses include videography, live-streaming and required closed-captioning.

Staffing: This program includes the Bureau Director and Equity & Change Manager.

Assets and Liabilities: This program does not own or operate any assets.

Program Information

Bureau: Bureau of Planning & Sustainability

Program Contact: Joe Zehnder

Website: http://www.portlandoregon.gov/bps

Contact Phone 503-823-7815

Comprehensive & Strategic Planning

Program Description & Goals

This program shapes city development through plans, policies and projects, to create a more prosperous, healthy, resilient and equitable city. The strategy in the 2035 Comprehensive Plan is for most households to be able to live in complete neighborhoods, which are places where people of all ages and abilities have safe and convenient access to more of the goods and services needed for successful lives. This means growing vibrant centers and corridors in more neighborhoods; increasing housing supply, options and affordability; supporting commercial development to grow jobs and an equitable low-carbon economy; and protecting natural resources.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Portlanders Living in Complete Neighborhoods	65%	63%	67%	66%	80%
Level of community diversity retained or achieved as neighborhoods change and grow	N/A	N/A	29%	29%	29%

Explanation of Services

A Comprehensive Plan growth-management plan is essential for the city to be able to shape how it changes and grows. It is also required by Oregon law. The program is organized into two teams: (1) Comprehensive Planning: This group maintains and updates the Comprehensive Plan and Citywide Systems Plan, responds to annexation requests, coordinates the urban service boundary, and coordinates growth management decisions with schools, neighboring jurisdictions and Metro. Current projects include facilitating the development of catalytic sites in East Portland (Rossi Farm Development Plan), and re-examining housing policies related to group living and shelters (a Department of Land Conservation and Development grant). The program added staff to improve BPS practices around effective and inclusive public engagement. This affects the design of projects planned for FY 2019-20. One new person
joined the team in FY 2018-19 focusing on community engagement. The position manages the Community Involvement Committee, a state-mandated advisory body to provide oversight of the bureau's land use-related community engagement practices. They advise staff on community engagement plans, research best practices, and maintain ongoing relationships with community-based organizations. (2) Transportation and Transit Coordination: This group provides land use planning support for major PBOT and TriMet projects, including station area and corridor planning to promote equitable transit-oriented development. This group recently led the creation of the Southwest Transit Corridor Equitable Housing Strategy and related memorandum of understanding with TriMet. They are now embarking on station-area planning at the Ross Island Bridge and the West Portland Town Center with
Prosper Portland and the Housing Bureau. The project will develop a plan for the West Portland Town Center, emphasizing positive health and prosperity outcomes for immigrants and communities of color living nearby. Staff will also advance more specific plans for affordable housing and commercial development at key sites. Other projects include: updating the bike parking code with PBOT, monitoring implementation of recently-adopted Transportation Demand Management rules, and researching the land use implications of automated vehicles. In partnership with PBOT and Portland Streetcar Inc., the team also recently received a grant from the Federal Transit Administration to provide land use and community development evaluation of a potential new streetcar line from Montgomery Park to Hollywood.

Equity Impacts

The 2035 Comprehensive Plan includes equity and anti-displacement policies that provide explicit direction to reduce disparities, increase access to opportunity, and mitigate burdens to those affected. The plan controls the distribution of growth and change and can have a significant impact on who benefits or is burdened. The program is working to promote land use changes that increase housing access and choice in high-income communities and developing new tools to prevent displacement in low-income communities. The group works closely with community-based organizations to understand community needs and is expanding work with partners to ensure that major transportation investments maximize benefits and avoid burdens on vulnerable communities including renters.

Changes to Program

With adoption of the 2035 Comprehensive Plan, a smaller ongoing team is adequate to continue work on state mandates and strategic actions to implement the plan and work with the City Attorney to address the appeals.

With the new “complete neighborhoods” growth strategy, BPS is shifting to a more holistic view of what makes a community successful — access to transportation options, services, housing choice, parks and nature, quality schools, and cultural facilities. Program priorities have been realigned to follow-through on new Comprehensive Plan policies related to equity and inclusion. Planning projects have changed from being mostly about zoning, physical form, and compatibility to having a focus on addressing human needs and outcomes. Also, more than ever, this work involves collaboration through multi-agency teams with PHB, PBOT and Prosper Portland.

In FY 2019-20, BPS will continue to increase work and projects with East Portland communities.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	271,173	331,326	428,117	227,577
Internal Materials and Services	83,904	122,130	89,039	5,000
Personnel	879,192	1,099,202	1,071,697	1,166,092
Sum:	**1,234,269**	**1,552,658**	**1,588,853**	**1,398,669**
FTE	8.71	12.67	1	8

Resources: The program is supported primarily by the General Fund with one or more grants each year. Past grants included Metro, DLCD, ODOT, the Federal Transit Administration, and the Center for Disease Control. Resources also include support to infrastructure bureaus through interagency agreements.

Expenses: Staff is more than 90 percent of the program budget. Typical projects also require funds for professional service contracts to supplement City staff. Most consultant services in recent years have been grant-funded. The number and size of projects that the program can undertake is directly related to funding. BPS maintains staff capacity to address ongoing state mandates and an annual program of projects; new discretionary projects require grant or other funding. There have been some changes in how this program is budgeted; therefore, prior year actuals may appear to be greater.

Staffing: The program currently has 8 full time employees, primarily land use planners and community engagement specialists. Additional limited duration staff are added if supported by specific grant-funded projects.

Assets and Liabilities: The program provides a regulatory and policy service and does not operate or own any assets.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Eric Engstrom
Website:	https://www.portlandoregon.gov/bps/57352	**Contact Phone**	503-823-3329

Urban Design & Research

Program Description & Goals

The Urban Design and Research program provides the essential technical assistance, economic analysis, design skills, research and expertise to guide long-range growth and development to make Portland a more prosperous, healthy, resilient and equitable city. Made up of economists, researchers, urban designers, historic buildings and architecture specialists, this team provides strategic guidance for BPS, City Council and other City bureaus on critical issues affecting the growth of Portland.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of new housing units that are in Centers and Corridors	89%	91%	89%	89%	80%
Percent of seven-county region's new housing growth	36%	36%	47%	25%	25%
Percentage of households at or above self-sufficiency	0	66%	80%	82%	0

Explanation of Services

The program is organized into two teams:
(1) Housing and Economic Interventions: The Housing and Economic Interventions group provides policy and data research analysis to help achieve Portland's housing and economic goals. This includes tracking real estate market and development trends, mapping displacement risk, maintaining the State-required Buildable Lands Inventory and Economic Opportunities Analysis, and providing housing and employment growth forecasts. This program coordinates and consults with other City bureaus on how to analyze the equity outcomes of policy decisions by identifying who will benefit and/or be burdened by policy proposals and capital projects. Program resources are used to identify vulnerable populations, including communities of color, and determine the potential impacts of proposals. The group was instrumental in the recent adoption of Inclusionary Housing regulations in Portland, and new zoning to facilitate manufactured housing.
(2) Urban Design and Historic Preservation: The Urban Design Studio provides design services on projects to create great places for all people – with a focus on inclusivity for communities of color, people with disabilities, children and the aging population. The Urban Design Studio produces the maps, diagrams, models, illustrations and renderings required for the development and implementation of city plans and land use decisions. Urban Design staff support all BPS projects, as well as projects in other City bureaus, to examine the physical and spatial design of planned growth and development. Historic resources staff maintains and updates the City's Historic Resource Inventory and provides consultation services to preserve and conserve historic buildings as Portland grows. The Historic Preservation program has focused resources on identifying and protecting historic and cultural resources of underrepresented communities, such as using state grant funds to identify African American historic resources in North and Northeast Portland.

Equity Impacts

The 2035 Comprehensive Plan includes equity and anti-displacement policies that provide explicit direction to manage growth to reduce disparities, increase access to opportunities and mitigate the burdens of land use and transportation decisions. The Comprehensive Plan and associated Zoning Map control the spatial distribution of growth and change and can have a significant impact on who benefits and who is burdened by that change. The Urban Design and Research program is actively working to reverse historical harm by promoting land use changes that increase housing access and choice in high-income communities and developing tools to implement anti-displacement policies to mitigate or reduce displacement risks for lower income communities.

Changes to Program

The 2016 adoption of the 2035 Comprehensive Plan prompted a re-alignment of program priorities to implement policies adopted with that plan – particularly new policies related to equity and inclusion. The 2035 Comprehensive Plan also included the Urban Design Framework, which seeks to concentrate growth and density in parts of Portland with access to transit, bike and pedestrian infrastructure to reduce Portland's overall carbon emissions.

Program staff are shifting their approach to land use planning to emphasize a more holistic view of what makes a community successful. However, some neighborhoods face gentrification risks and growth must be managed in ways that also helps stabilize communities. In recent years a larger share of the program's work has shifted to support the development of housing options, especially affordable housing. In terms of economic development, this program has narrowed its focus to increasing living-wage job opportunities, especially for people without college degrees.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	45,298	12,075	16,750	66,261
Internal Materials and Services	1,374	4,060	10,000	0
Personnel	321,256	505,706	529,522	1,686,842
Sum:	**367,928**	**521,841**	**556,272**	**1,753,103**
FTE	4	4	6.88	12.73

Resources: The program receives funding from General Fund, grant-funded projects and IAs for data and analysis services. In FY 2019-20, approximately 1.0 FTE is funded by a FTA/Metro grant for streetcar planning and from a PBOT IA for work on equity analysis and policy in East Portland.

Expenses: Staffing is 90 percent of the budget for this program. Projects typically also require funds for consultant and other professional services. Most of the consultant budget in recent years has been grant-funded. With current funding levels, the program is largely dependent on seeking grant funding to carry out discretionary projects.

Due to budget structure changes being implemented in FY 2019-20, this functional area has not been historically budgeted; therefore some prior year actuals are not available.

Staffing: The program is currently staffed by 12.73 full time employees, including urban designers, land use planners, economic development and real estate specialists, and analysts. This includes limited duration staff hired to support specific grant-funded projects.
The FY 2019-20 budget includes one-time funding for an intern position to continue development and evaluation of the next generation of the Historic Resource Inventory.

Assets and Liabilities: The program provides a regulatory and policy service and does not operate or own any assets.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Tom Armstrong
Website:	https://www.portlandoregon.gov/bps/43729	**Contact Phone**	503-823-3527

Code Development

Program Description & Goals

The Code Development Program
creates clear, efficient, effective, and defensible development regulations that ensure Portland stays on
course to achieve its goals for people, environment, and economy. The program balances the benefits of regulation with the cost of implementation and compliance.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percent of seven-county region's new housing growth	36%	36%		25%	25%
Middle housing production	14%	11%	16%	18%	25%

Explanation of Services

The program's workplan includes five main types of work:
(1) Major Code Projects: The program staff lead large, multi-year, multi-bureau projects to improve development codes
and processes. The scale of these projects is significant due to the types and amounts of development impacted, complexity of the issues and code, size and depth of community engagement and level of
community concern and controversy. These projects often address issues that have had or will have inequitable impacts on communities of color, requiring an early and thorough consideration of equity. Current examples are the Residential Infill Project and a project to rewrite the design review code. These projects require a minimum of 2.0 FTE and support from other bureaus and BPS programs with a goal to deliver two to three major projects every 18 months.
(2) Quick-response Projects: The program also undertakes smaller projects related to development issues that become acute community and City Council priorities. These projects vary in scale but all require quick, thorough, data-driven technical work and efficient, genuine and defensible public engagement. In FY 2019-20, BPS anticipates the need to respond to federal changes to cell tower regulations and state building code changes related to tiny houses on wheels. A single staff person may be able to handle up to three of these projects over a year with support from other BPS programs.
(3) Zoning Code Maintenance and Improvement: The program leads the Regulatory Improvement Program (RICAP), which develops and manages an annual package of zoning code improvements in collaboration with BDS.
(4) Code Development Expertise: About 50 percent of the bureau's planning projects include development of code amendments and other regulatory tools.
The Code Development Program provides expert technical code writing and editing services to these projects and to other City bureaus.
(5) Planning Program Management: The Code Program also contains 3.0 FTE that coordinate management, communication and administrative services to all BPS
Planning programs and the Planning and Sustainability Commission.

Equity Impacts

The 2035 Comprehensive Plan includes equity and anti-displacement policies that provide explicit direction to reduce disparities, increase access to opportunity, and mitigate burdens to those affected. The plan controls the distribution of growth and change and can have a significant impact on who benefits or is burdened. The program is working to revamp residential development codes to increase housing access and choice in high-opportunity communities. The program is working with the Joint Task Force on Homelessness on code projects to remove barriers to providing additional shelter. All code projects are evaluated in terms of their impact on displacement in low-income communities.

Changes to Program

FY 2019-20 includes reduction in the staffing by 1.5 FTE in this program. This is a result of the 1 percent reduction budget guidance and loss of expected revenues from Land Use Services (LUS) revenues. The FY 2019-20 budget includes one-time funding for development of a anti-displacement plan. This will support 2.0 FTE to lead the work with community stakeholders drawn from the Anti-Displacement PDX network and representatives of other City bureaus.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	7,875	41,099	219,050	57,950
Internal Materials and Services	1,253	1,862	0	5,000
Personnel	1,037,018	962,054	646,185	1,611,122
Sum:	**1,046,146**	**1,005,015**	**865,235**	**1,674,072**
FTE	6	4		

Resources: In FY 2018-19, over 60 percent of this program was funded by Development Services Fees. Due to a downturn in new development project, these fees are not available for BPS programs in FY 2019-20. In FY 2019-20 the program will be supported primarily by General Fund resources and various grants.

Expenses: Staffing represents more than 95 percent of the budget for the Code Program. There have been some changes in how this program is budgeted; therefore, prior year actuals may appear to be lower.

Staffing: The program is currently staffed by 11 full time employees, primarily land use planners.

Assets and Liabilities: The program provides a community development and public engagement service and does not operate or own any assets.

Program Information

Bureau: Bureau of Planning & Sustainability

Website: https://www.portlandoregon.gov/bps/62880

Program Contact: Sandra Wood

Contact Phone 503-823-7949

Waste Collection

Program Description & Goals

BPS is responsible for managing the garbage, recycling, and composting collection system for residents and businesses in Portland. The Waste Collection program's guiding principles are to:
1) Advance Climate Action Plan goals through increased recovery and waste prevention.
2) Ensure cost-effective, safe and environmentally sound operations.
3) Establish rates through a process that promotes operational efficiencies while meeting policy goals.
4) Provide exemplary customer service.
5) Develop a resilient and equitable system through increased participation of women and minority workers.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of waste recycled or composted	63%	54%	54%	56%	90%
Typical curbside residential bill as a percent of median income	62%	60%	60%	60%	60%

Explanation of Services

Waste Collection: This team carries out City Council's policy direction to reduce waste, increase recycling and composting, and maintain high-quality collection services at reasonable rates. Residential waste collection includes franchising residential collection companies, enforcing service standards, setting rates, and customer support. The annual rate-setting process establishes the fee hauling companies can charge customers for providing residential garbage, recycling and composting collection.
The commercial program oversees waste, recycling and composting collection services provided by private hauling companies to businesses and multifamily customers. BPS establishes service standards, issues permits to haulers and ensures compliance with City requirements. Commercial service is not franchised (i.e., rate-regulated) in Portland.
Public Trash Cans: The Public Trash Can program helps Portland be the cleanest city in America by providing sidewalk trash cans and overseeing collection service in downtown and nine other business areas of the city. BPS is expanding this program to other business districts beginning in East Portland. This team collects fees from garbage and recycling companies; a residential five percent franchise fee and a commercial tonnage fee.
The revenues are used by BPS waste collections, climate and sustainability programs, and also provide funds for waste related services undertaken by the BDS Nuisance Inspection Program and the OMF Homeless Urban Camping Impact Reduction Program. Policy development for City Council advances the City's climate goals; including establishing requirements for garbage and recycling companies to use cleaner and less polluting trucks and developing a single-use plastics reduction plan that expands upon the bans of polystyrene foam take-out food containers and plastic check-out bags by retailers. Additional policy work is coordinated with Metro and the Department of Environmental Quality (DEQ) on regional and statewide priorities around multifamily recycling, business food scraps separation requirements and addressing the international recycling market challenges.

Equity Impacts

BPS has undertaken significant equity measures as part of major projects. A diverse set of stakeholders reviewed the solid waste collection system's ability to achieve the City's values related to equity and diversity — both in terms of workforce and company ownership. City Council accepted the new Waste Equity Workplan in October 2018 and approved the first implementation item in December. This action establishes a special procurement process to provide access and opportunity for capacity-building to companies certified by the Oregon COBID (Certification Office for Business Inclusion and Diversity) when the City procures waste collection services.
Expansion of the public trash can program was prioritized in East Portland. The single-use plastics policy adopted by Council in December 2018 was developed in close cooperation with representatives of the disabled community to assure their needs are met.

Changes to Program

Unprecedented recycling market conditions have impacted recyclers worldwide and caused significant cost increases for providing recycling services in Portland. Recyclable materials are a commodity used by manufacturers throughout the world, and China was the largest recipient of materials exported by the U.S. China recently adopted broad policies aimed at reducing environmental impacts. These policies have caused a demand/supply imbalance that has significantly depressed prices for recyclables.
In addition, recycling sorting facilities have had to slow their sorting lines and hire more people to further separate materials. The combination of reduced market demand and increased facility operating costs have resulted in rate increases for Portland residents and businesses. BPS is actively participating in the Oregon DEQ Recycling Steering Committee to assess current recycling programs and recommend system improvements.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	36	1,007	0	2,321,932
Internal Materials and Services	0	0	682	246,599
Personnel	-608	0	0	1,267,674
Fund Expense				
Contingency	0	0	410,383	226,595
Debt Service	60,721	66,579	72,419	2,329,893
Fund Transfers - Expense	189,283	193,194	202,422	1,180,283
Ending Fund Balance	4,196,524	4,994,931	4,092,097	805,727
Sum:	**4,445,956**	**5,255,711**	**4,778,003**	**8,378,703**
FTE	0	0	9.5	10.5

Resources: The program is funded through a combination of resources, including the Solid Waste Management Fund and a grant, which are relatively stable sources of funding.

Expenses: The program staff salaries and benefits make up approximately 34 percent of the budget. The remaining 66 percent is dedicated to external materials and services, including professional services (e.g., contracts that support the residential rate review process, the purchase of recycling and composting containers for businesses and public trash can program), an interagency agreement with BDS to resolve nuisance issues, and staff education and professional development.
Due to budget structure changes being implemented in FY 2019-20, this functional area has not been historically budgeted; therefore some prior year actuals are not available.

Staffing: 10.5 FTE provide the services of this program, including two and a half managers, three program coordinators (various levels), a code specialist for compliance issues, two administrative staff to manage customer support and hauler operations oversight, and an outreach position focused on community engagement. Staffing has remained relatively stable in the past five years.

Assets and Liabilities: This program owns, services, and maintains hundreds of public trash and recycling cans installed in the right-of-way throughout the City. These containers are currently being replaced with new cans, and the program is expanding throughout the city by FY 2022-23. The public trash and recycling can maintenance is financed through commercial tonnage fees.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Bruce Walker
Website:	https://www.portlandoregon.gov/bps/41621	**Contact Phone**	503-823-7772

Sustainability Engagement

Program Description & Goals

The Sustainability Engagement team educates and collaborates with residents, businesses, community organizations, and neighborhoods to make informed decisions about sustainable practices, with a focus on resource conservation. Responsibilities include design, development, coordination, implementation, and evaluation of community engagement programs, campaigns, and events. Efforts focus on motivating voluntary and market-based actions that advance City and bureau goals for a sustainable city that is prosperous, healthy, resilient and equitable.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of residents reached by sustainability training and outreach	203,232	212,655	200,000	215,000	215,000
Number of businesses reached by sustainability outreach and training	2,736	4,097	3,500	3,500	3,000
Number of multifamily units provided with waste reduction assistance	16,035	10,516	15,000	25,000	25,000
Number of residents participating in the Fix-It Fairs	814	1,600	1,300	1,800	2,000
Cost per-Fix-It Fair workshop participant	$73	$75	$90	$75	$70

Explanation of Services

This program is organized into two teams, Sustainable Communities and Sustainable Workplace, both of which support the City in achieving a high-quality solid waste and recycling service by providing necessary service information and customer-requested resources. These teams also help implement the City's Climate Action Plan, and Metro's Regional Waste Management Plan (anticipated to be adopted in early 2019).

(1) Sustainable Communities: This team designs and implements community programs and events in partnership with communities through thoughtful engagement and partnership building, with a focus on low-income populations and communities of color. The team produces the Climate Action Now! Campaign, Fix-it Fairs, Community Collection Events, Multifamily Waste Reduction Program, Be Cart Smart garbage, recycling and composting education, Master Recycler Course and Volunteer Program, Resourceful PDX, and the twice-annual Curbsider publication reaching all Portland single-family households. The community expresses continued demand for these services and gives positive feedback about their experience with these services. New metrics developed in FY 2019-20 will enable this team to better measure program results and inform continuous improvements that meet community's needs.

(2) Sustainable Workplace: The Sustainability at Work team educates, assists, and collaborates with businesses, community organizations, and City bureaus to inform decisions about sustainable workplace practices and efficiencies. Since its launch in 2007, the program goals have been to help Portland workplaces — from small start-ups and nonprofits to large corporations — to establish and improve recycling and composting practices and to explore options for reducing overall work-related carbon emissions.

Equity Impacts

The team continues to make program changes to better serve communities of color. This experience has informed the need for updated program metrics, updated community engagement strategies, and a new approach to program development and design.
Example efforts include:
1) A new community-designed Master Recycler course.
2) Building Sustainability at Work's brand with entrepreneurs of color through attending events and forming new partnerships.
3) Fix-It Fair launching a new strategy to meet translation needs for a wider audience.
4) Work in collaboration with communities of color to design culturally-appropriate content and engagement strategies.
5) Community Collection Events expanding the amount of staff time and funding allocated to East Portland and hosting listening sessions to identify barriers for communities of color, low-income communities and multifamily residents to inform program changes for 2019.

Changes to Program

In FY 2018-19, a combination of staff totaling 1.0 FTE have been directed away from Sustainable Workplace to create a new Development and Design initiative that will support both teams. This initiative will respond to new community priorities and bureau needs. It aims to increase co-creation in partnership with community by providing a new model for development and design, bolstering project managers' skills, and making new tools available.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	334	99	0	449,432
Internal Materials and Services	0	0	0	226,311
Personnel	737	26,154	0	1,535,880
Sum:	**1,071**	**26,253**	**0**	**2,211,623**
FTE	1	0	11.4	12.4

Resources: The program is funded through a combination of resources, including the Solid Waste Management Fund, grants, and general fund resources.

Expenses: Primary expenses of the program are staff salaries and benefits (70 percent of the total budget), with the remaining budget dedicated to external materials and services, including community collection grants, bi-annual citywide mailing of the Curbsider newsletter, and contracts with Portland State University (PSU) to deliver program services as well as staff education and professional development. There have been some changes in how this program is budgeted; therefore, prior year actuals may appear to be lower.

Staffing: 12.4 FTE provide the services of this program, including 2.5 managers and several program coordinators (various levels). Staffing has remained relatively stable in the past five years.

Assets and Liabilities: This program does not own or operate any assets.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Jill Kolek
Website:	https://www.portlandoregon.gov/sustainabilityatwork/	**Contact Phone**	503-823-7590

Climate, Energy & Sustainable Development

Program Description & Goals

This program provides analysis and pilot projects, policies and programs to advance City goals for an equitable, low-carbon community. Local carbon emissions continue to decline, with a 21 percent reduction compared to a two percent increase for the U.S. (since 1990). On a per person basis, emissions are now 41 percent lower. This reflects a wide range of efforts by the City, businesses, residents and community partners to create walkable neighborhoods, reduce energy use and garbage, and increase biking, transit and renewable energy such as solar and wind.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage reduction in per person carbon emissions from 1990 levels	41%	41%	41%	42%	90%
Per person residential energy use (million BTUs)	26.00	24.40	23.00	23.00	20.90
Utility savings to City from energy-efficiency projects (million dollars)	$7.70	$7.22	$6.50	$6.50	$6.00
Percentage of City electricity use from renewable resources	100%	100%	100%	100%	100%

Explanation of Services

While the challenge of climate change is more urgent than ever, Portland's response is not new. The investments that have helped reduce carbon emissions are the same things that make people want to live in Portland: creating walkable neighborhoods with shopping, restaurants and parks; investing in transit, sidewalks and bikeways; protecting and restoring natural areas; and making our homes and businesses more efficient and comfortable. This program includes three teams: (1) Climate and Sustainable Development Team: This team ensures Portland maintains its global standing as a front-runner city developing innovative climate actions and delivering meaningful results. Activities include: developing and implementing Portland's Climate Action Plan; building resilience to the impacts of climate change; increasing the use of electric vehicles and ensuring the benefits reach low-income populations; promoting deconstruction, workforce development and salvaged building material market expansion; and supporting community-driven climate actions, particularly those led by organizations serving communities of color. (2) Energy Programs and Policy Team: This team develops and implements policies and delivers programs focused on energy efficiency and renewable energy including: implementing performance scores for houses and mid-to-large size commercial buildings; reducing energy use in City buildings and facilities; developing community solar; partnering with the utilities to green the energy system; advocating for meeting aggressive energy goals in updates to the Oregon building code; and engaging with State lawmakers to advance climate-friendly legislation. (3) Portland Clean Energy Fund Team: This new team will focus on program design, development and ultimate implementation of the Fund, passed by Portland voters in November 2018. This Fund is expected to manage $54-71 million in revenues per year to provide clean energy projects and job training with a focus on delivering benefits to frontline communities.

Equity Impacts

Frontline communities have historically been under-served by climate and energy-related programs and investments and under-represented in decision-making. Ensuring the just distribution of the benefits of climate actions, and addressing the unequal burdens of the impacts of climate change like heat waves, requires intentional policies and projects that address the systems that perpetuate both climate change and inequity. Example efforts include a year-long climate equity metrics development project, supporting community-led efforts such as the AfroEcology project, and offsetting the costs of the Home Energy Score policy for low-income homeowners. This program is currently centering the wants and needs of frontline communities by advancing co-creation models of engagement for both the Climate Action Plan update project, and the development of the voter approved Portland Clean Energy Fund.

Changes to Program

In the last year, Portland has signed on to regional, national and international declarations in the areas of low-carbon buildings, zero waste, clean transportation, equity and delivering on the Paris climate accords. Delivering on those commitments, along with meeting existing local goals outlined in the Climate Action Plan and City Council's 100% Renewable Energy resolution, has increased the urgency and demand for this program's services. The creation of the new PCEF program and expected revenues is a significant change in the program requiring additional staff, materials and services. BPS' PCEF operating budget for FY 2019-20 is $2,253,075, which will help initiate the design, development, and implementation of Portland Clean Energy Fund. The budget includes direct program support, material and services, and indirect cost related to Revenue Services and BPS Internal Services. The expected tax revenue for FY 2019-20 is 50 million.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	2,044	13,731	79,424	1,100,200
Internal Materials and Services	15,868	16,237	26,576	215,460
Personnel	62,131	134,311	191,790	2,893,555
Fund Expense				
Contingency	0	0	-297,790	10,000,000
Debt Service	0	0	297,790	0
Fund Transfers - Expense	0	0	0	0
Ending Fund Balance	0	0	0	40,084,413
Sum:	**80,043**	**164,279**	**297,790**	**54,293,628**
FTE	0	2	13.71	19.2

Resources: The program is funded through a mixture of resources, including the Solid Waste Management Fund, and General Fund, and the newly created Portland Clean Energy Fund. The balance of funding comes from grants and interagency agreements which can vary from year to year.

Expenses: Historically, the primary expenses of the program are staff salaries and benefits (80 percent of the budget), with the remaining budget dedicated to external materials and services, including professional services, association dues, staff education and professional development. The addition of the PCEF program will shift the majority of the program expenses to grants to community organizations. Staff expenses are the most critical to delivering the services of the program. Due to budget structure changes being implemented in FY 2019-20, this functional area has not been historically budgeted; therefore some prior year actuals are not available.

Staffing: 19.2 FTE provide the services of this program, including: team managers, several program coordinators (various levels), an outreach position focused on engaging frontline communities, and a couple of interns. Approximately 5 new staff positions have been created to run the PCEF program. A replacement for the Chief Sustainability Officer was hired, and a currently vacant senior coordinator position will not be refilled.

Assets and Liabilities: This program does not own or operate any assets.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Michele Crim
Website:	http://www.portlandoregon.gov/bps	**Contact Phone**	503-823-5638

Smart Cities

Program Description & Goals

The Smart Cities program uses existing and innovative technologies, data collection, and data management tools to enhance community engagement and to improve service delivery to the public. These strategies advance the City's goals around equity, mobility, affordability, sustainability, community health and safety, workforce development, and resiliency, with a focus on under-served communities. BPS' Smart Cities program facilitates multi-bureau collaboration, and coordinates the publication, open access and widespread sharing of data.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total amount of outside funding or in-kind support for the Smart Cities program secured through grants, partnerships or other funding mechanisms.	N/A	$400,000	$100,000	$200,000	$500,000
Number of datasets available for download on the City of Portland's Open Data portal(s)	100	150	300	500	500

Explanation of Services

In May 2017, City Council established an Open Data Program (Ordinance No. 188356), committing the City to the publication, open access, and widespread sharing of data collected and generated by the City, and by private sector companies, non-profit organizations, academia, and other parties working on behalf of the City. The Open Data Policy and Program aims to:
1) Increase transparency.
2) Foster a culture of using data to inform and evaluate City decisions.
3) Reduce staff time devoted to responding to requests for City data.
4) Encourage innovative approaches to meeting City goals.
5) Achieve more equitable program and service outcomes.
BPS and Smart City PDX are leading the implementation of the Open Data Program. In June 2017, City Council established a citywide Smart Cities Steering Committee to create a governance structure for the City's Smart Cities work, which
BPS leads (Resolution No. 37290). The Committee facilitates internal and external collaboration, coordinates fundraising efforts, sets priorities, identifies focus areas,
establishes goals for the City's Smart Cities work, and facilitates community outreach and involvement as Smart Cities projects are developed and deployed.
Smart Cities prioritizes projects that reduce inequities for people of color
and people with disabilities. Before advancing projects, BPS uses established criteria to ensure that projects protect privacy, promote safety, and address equity to create measurable community benefits.
In June 2018, City Council adopted the Smart City PDX Priorities Framework to guide City staff in how data, integrated with community engagement, will be collected and used for decision-making and to determine investments (e.g., staff time and expertise, funds, assets) in Smart City PDX projects.

Equity Impacts

Technology has created more connectivity, more access to information, and has improved the functioning of people and institutions to evaluate, adapt, and respond in ways they have never done before. Yet at a local scale, due to existing racial and socioeconomic disparities, the benefits of these technological advances have not yet accrued for all. In June 2018, Portland City Council adopted the Smart City PDX Priorities Framework (Resolution No. 37371), establishing a structure through which the City can address inequities and disparities using data. That, in turn, can be used and invested in technology-driven projects that improve people's lives, bringing benefits to underserved communities.

Changes to Program

In FY 2019-20, the program will develop new indicators and metrics of success based on input from underserved communities. Current efforts include: air quality sensor testing and deployment; infrastructure earth movement sensor pilot, open data
program; data collection, storage, integration and analysis; disaster preparedness; smart autonomous vehicles; traffic safety sensors; and management of public right-of-way and assets to address the growing demand for wireless and data services.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	67,485	150,940	11,600
Internal Materials and Services	0	259	0	0
Personnel	0	0	203,256	287,615
Sum:	**0**	**67,743**	**354,196**	**299,215**
FTE	0	0	2	2

Resources: This program is funded through ongoing General Fund resources. Individual projects are often supported by interagency agreements, intergovernmental agreements, grants and in-kind services from partners.

Expenses: Primary expenses of the program are staff salaries and benefits.

Staffing: This program includes two staff who coordinate the Smart Cities program across multiple bureaus (e.g., facilitating the Smart Cities Steering Committee), implement specific Smart Cities projects (e.g., air quality sensors) and leading the City's Open Data Program. The program is managed by BPS' Tech Services Manager position, which is included in the bureau's Business Services program offer.

Assets and Liabilities: The program currently owns 6 air quality sensor systems. These sensors were purchased as part of a pilot funded by the National Institute of Standards and Technology (NIST) to evaluate the performance of a variety of lower-cost, internet-connected, roadside air quality sensors. Total cost for the six sensors was approximately $32,000. The sensors are installed on traffic signals on 122nd Ave in East Portland. The pilot runs through September 2019. The long-term plan for these sensors is yet to be determined.

Program Information

Bureau:	Bureau of Planning & Sustainability	**Program Contact:**	Kevin Martin
Website:	https://www.smartcitypdx.com/	**Contact Phone**	503-823-7710

Administration

Program Description & Goals

The Office of Community & Civic Life (Civic Life) Administration team provides strategic direction, policy, budget and financial management, human resources, contracts and grants management, organizational development, administrative support and communications functioning.

The role of this team is to build and support a high functioning multicultural work environment—infusing equitable practices, procedures and policies through: excellent business management, responsive operational structures, progressive hiring and retention methods, responsible stewardship of fiscal resources, championing of data and metrics, strategic communications, and innovative application of technology.

There are currently no team specific metrics, but the bureau plans to develop measures for the next budget cycle.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Administration is the foundation for mission and fiscal stewardship and organizational performance. This team supports all human resource functions, facilities, technology, data and metrics, budget development, management and communications for the bureau.

This team makes sure staff are paid, grants and contracts are appropriately drafted, vendors are paid, as well supporting the bureau's compliance with City rules around human resources, contracting, procurement, technology usage, and more. Professional and multimedia communications is integral to the functioning of the bureau and implementation of program activities.

This impacts community insomuch as without the team, the bureau would not be able to support basic operational functioning, nor support the work of the externally facing programs or grants.

Equity Impacts

If done well, this team's work has significant equity impacts. This team oversees the creation and implementation of the bureau's Affirmative Action Plan & Racial Equity Plan. Additionally, this team supports the leadership team in bureau policy development with an equity analysis and participates in Citywide Racial Equity efforts.

With new bureau leadership in late 2017, we have seen a significant increase in hiring multicultural and multilingual staff with a specific increase in people of color at all levels of the organization, including the leadership team. In 2018, over 80% of regular, permanent staff hired identified as people of color. While hiring a diverse staff is not insignificant in and of itself, the worldview and lived experience brought by these employees has immeasurable impact on how our bureau delivers its services to both our internal customers and to the community. Additionally, five of the 12 new hires speak a language included in the nine safe harbor languages for Portland. This demonstrably shows the bureau is moving towards service of more community members by having the ability to not only speak and write their language, but also offer programming with culturally specific lens.

This team will continue to support the equity efforts of the bureau and Citywide in collaboration with the Office of Equity and Human Rights, as appropriate.

Changes to Program

The bureau managed multiple organizational change and development efforts in FY 2018-19, including but not limited to re-naming and re-branding, convening a code-change committee to recommend changes to City Code Chapter 3.96 defining the functions of the bureau, ongoing personnel changes, and facilitating the transition of the East Portland Action Plan to the Commissioner of Public Safety.

This team launched a bureau data workgroup to be further developed in FY 2019-20, focusing on these key areas; standardizing methods of data capture, retention and analysis; reviewing, assessing, and developing program performance metrics; and educating all bureau staff on being data driven.

The team continues to support the many ways in which Portlanders engage digitally. This year saw the launch of the first online payment page for this bureau, with a goal of supporting every other relevant program to accept online payments in FY 2019-20 & FY 2020-21.

Communications was added to bureau staffing in FY 2018-19, an initial investment in building our capacity to reach existing and new audiences in multiple media formats. An additional communications role is proposed for FY 2019-20, with 0.5 FTE of that Administrative Specialist III position within Administration (and 0.5 FTE within Cannabis).

In the summer of 2017, the bureau was re-organized under interim leadership. Those changes eliminated all manager-level positions. This is not a sustainable nor appropriate leadership structure for the bureau. In FY 2019-20, a Manager II position overseeing the Livability, Cannabis, Information & Referral and Business Operations (under Administration) programs will be added. (An additional manager position will be created by reclassifying an existing Supervisor I position in the Community & Neighborhood Involvement Center.)

In FY 2019-20, a temporary position staffing the code-change work will come to its scheduled end.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	18,206	48,061	56,219	68,310
Internal Materials and Services	55,804	101,731	103,644	81,561
Personnel	770,642	584,951	727,100	921,734
Sum:	**844,652**	**734,743**	**886,963**	**1,071,605**
FTE	5	4.5	5.4	6.15

Resources: General Fund.

Expenses: Personnel, communications materials and services and program expenses.

Staffing: Changes in FY 2019-20: Administrative Specialist III (communications role). Elimination of temporary Coordinator I (code change). See narrative under “Changes to Program.”

Assets and Liabilities: The bureau owns one asset, the Historic Kenton Firehouse. The Kenton Firehouse houses North Portland Neighborhood Services, a city-staffed district coalition office.

Program Information

Bureau: Office of Community and Civic Life **Program Contact:** Michelle Rodriguez

Website: www.portlandoregon.gov/civic **Contact Phone** 503-823-4831

Adapt to Impact

Program Description & Goals

As a part of the Community & Neighborhood Involvement Center (CNIC), Adapt to Impact is comprised of Civic Life's efforts whose primary purpose is to collaborate with other bureaus on the practice and policies of community partnership. The interdisciplinary team consists of three overhead funded programs (advisory bodies, citywide public involvement best practices, mental health) and disability, a general fund program. The goal is to strategically transform institutional structures, policies and practices toward the authentic engagement of communities not well represented, engaged or served in City functioning.

This is achieved in two primary ways:
• Through education, practice and policy development in each content area.
• Through partnership efforts with other bureaus.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
No. of bureau consultations	N/A	N/A		4	0

Explanation of Services

Siloed approaches cannot adequately address complex and often interconnected issues. Civic Life seeks to model and champion institutional practices for inclusion and decision-making practices that adapt to community conditions. Civic Life's ability to partner with other bureaus is integral to achieving these goals.

Each of the four areas within Adapt to Impact deliver its own set of services.

These include but are not limited to the following:
• Advisory bodies: centralized support of city advisory bodies, offering training, policies, templates and tools for city employees and bureaus staffing these bodies.
• Disability: research and leadership development programs.
• Mental health: mental health "first aid" training for city employees and advisory bodies.
• Citywide public involvement best practices: Public Involvement Advisory Council.

Collectively these four specialties work together to offer tailored services to other bureaus to examine the fundamental assumptions informing institutional practices and to implement adaptive changes at all levels of decision-making and investment. Services to other bureaus include but are not limited to public policy review and development, capacity-building support and training, practice guidelines, building teams' awareness and knowledge base, connecting and promoting collaboration with community networks, multi-bureau partnerships, spotlighting and communicating peer success with city and community audiences, and short- and long-term consulting.

Equity Impacts

The ability of the City to serve and positively impact communities of color, people with disabilities, people who experience mental health concerns or crisis, and others cannot be accomplished through program services alone. Fundamentally, it requires institutional change and the adoption of new assumptions and practices of community partnership. While these four areas primarily address city employees and bureaus, this work is in service of the adoption of community-informed practices that result in the delivery of more equitable services and impact to all communities.

Changes to Program

FY 2019-20 is the first year that these four areas will be working together as one team. Previously, each one-person program operated independently despite shared functions. This change represents the bureau's commitment to reject siloed thinking and fragmented, under-capacitated delivery of services. Bringing together four efforts in a unified program requires changes to program identities, staff relationships and capacity, supervision, budgeting, performance evaluation and communications.

Program development began in FY 2018-19 (actively between October 2018 and June 2019). In FY 2019-20, a new Supervisor II position will be created to oversee this program. The Supervisor II position will be reclassified from an existing Coordinator II position in the Immigrant and Refugee program. The integration of immigrant and refugee perspectives within Adapt to Impact will be developed in FY 2019-20 and implemented in FY 2020-21.

In FY 2019-20, the CNIC Supervisor I position will be reclassified as Manager II. This position will oversee the Adapt to Impact, Diversity and Civic Leadership, Neighborhood Outreach and Support, Immigrant and Refugee and Youth programs. This position is reflected in the program offer for Neighborhood Outreach and Support.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	186,820
Internal Materials and Services	0	0	0	53,200
Personnel	0	0	0	557,794
Sum:	**0**	**0**	**0**	**797,814**
FTE	0	0	0	4

Resources: General Fund.

Expenses: Personnel, technology, community leadership support, and program expenses related to travel, convening and supplies.

Staffing: Changes in FY 2019-20: Supervisor II (previously Coordinator II). See narrative under "Changes to Program."

Assets and Liabilities:	N/A

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	Dianne Riley
Website:	https://www.portlandoregon.gov/civic/77242	**Contact Phone**	503-823-3075

Information & Referral

Program Description & Goals

The City of Portland/Multnomah County Information and Referral (I&R) program is a central resource for information and referral to all City and County bureaus, programs and services. In addition, the program also assists community members with information concerning local community and social services. The program staff provide assistance by phone, to walk-in patrons at City Hall (and the Portland Building when it reopens in December 2019), and through electronic communication channels. We are currently receiving and responding to approximately 100,000 inquiries a year.

The program's mission is to facilitate community access to local government and the services it provides. By providing customer-focused access in a timely and efficient manner, community members are more likely to engage with local government, facilitating more inclusive and equitable participation in local governance. The I&R Program consistently meets our efficiency goal of answering at least 90% of incoming calls within 25 seconds. This is as high a level of service as you can expect of any call center. Studies show that community members are more likely to engage with local government if they perceive that their efforts are effective, and this level and quality of service enhances that perception.

A recent focus for the program has been increasing the "one-call resolution rate." This rate refers to the number of calls that our I&R staff can resolve without having to transfer elsewhere. Historically one-call resolution rates for the I&R Program have been 20% or lower. We set a three-year goal last year of increasing that to 30%. We have seen minor increases in this rate and expect improvements to online service request systems and ongoing efforts to institute a more coordinated customer service system to accelerate the increase in one-call resolutions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of I&R calls and email inquiries responded to	115,997	96,652	100,000	110,000	0
Percentage of calls answered in less than 25 seconds	93.00%	90.61%	90.00%	90.00%	0
One call resolution rate	0	21%	25%	25%	0

Explanation of Services

The I&R Program provides community members with a single point of access to local government information and services and helps community members to gain access and understand how these various service delivery systems work. Without this assistance, accessing local government would be much more difficult for many community members. The program is working with both the City's Website Replacement Project and the Consolidated Customer Service Project to continue to make it easier for community members to submit requests and access information they are seeking. Offering easier and varied ways for community members to access government within a coordinated customer service system has proven in other US cities to increase the contacting rate of community members who are lower income, from communities of color and people with disabilities.

Equity Impacts

A recent community service survey conducted by the City found that those with less education, lower incomes and communities of color contact the City at lower rates. Those from households with residents who primarily speak a language besides English were more likely to cite a lack of knowledge of how to contact the City as a reason not to contact. Residents with lower socio-economic status rated the City's services less positively than others. Those living with disabilities indicated more challenges and were less positive about their interactions with the City. People of color said getting information from the City is more difficult than white people.

These findings indicate that the City must make access to services easier and simpler and address institutional biases and barriers. The Information and Referral Program is a tool that must be built upon to facilitate equitable access for all Portlanders. We are currently working to do this by expanding our ability to assist community members with reporting concerns and filing requests for services by phone using existing bureau online tools and will continue working with the City projects like the website replacement project and the 311 Program to improve and increase accessibility for community members. We are also looking for opportunities to better inform community members about our existing I&R Program services.

Changes to Program

The City/County I&R Program has been minimally changed in recent years. I&R will be integrated as part of the 311 Program (refer to 311 Program Offer). Over the past couple of years, the program has been used increasingly as a tool by which community members can file reports directly through the call center regarding community issues such as homeless campsites. We are currently working with the Graffiti Abatement program to assist with intake of graffiti reports. The program has also been expanding in its role assisting callers in filing reports using online tools as those tools become available. The I&R Program is working closely with the City of Portland's Website Replacement Project which is redesigning the City's website to improve tools for community members to more easily access services such as new online forms. As stated earlier one of the key measures of the I&R Program is "one-call resolution rate" which we are working to increase by expanding this type of service provision by the call center.

In FY 2019-20, 0.15 FTE of an Information & Referral Specialist previously charged to the Community & Neighborhood Involvement Center will be returned to I&R and a new Manager II position will oversee the Livability, Cannabis, Information & Referral and Business Operations programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,543	5,439	7,602	7,365
Internal Materials and Services	87,025	85,943	88,186	90,469
Personnel	496,212	508,875	516,834	607,162
Sum:	**586,780**	**600,257**	**612,622**	**704,996**
FTE	5.85	5.75	5.75	6.15

Resources: Multnomah County contributes half the revenue for this jointly shared program. The City portion is overhead and general fund.

Expenses:	Personnel, technology, professional membership dues and limited program expenses.
Staffing:	Changes in FY 2019-20: Information & Referral Specialist (from 0.85 to 1.0) and Manager II (see Changes to Program)
Assets and Liabilities:	N/A

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	John Dutt
Website:	https://www.portlandoregon.gov/civic/28398	**Contact Phone**	503-865-2625

311 Program

Program Description & Goals

The goals of the Citywide 311 Program are 1) to advance the City's efforts to provide equitable, high-quality information and services to all community members, businesses and visitors online, over the phone and in-person at City buildings and 2) to provide valuable data and insights into the community's needs and interests, allowing Bureaus and City Council to make more informed service and communication decisions.

Civic Life will work with the Office of Management and Finance to develop performance measures for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The 311 Customer Service Program provides a single point of contact for community members to access City government and the services it provides. The program also provides information and referral services to the community for other local government, community and social services, including vital and time sensitive public notification in emergency and disaster. The program's purpose is to simplify community member access to services by serving as a welcoming and knowledgeable front door for both the City and the County government. This purpose reflects the Office of Community & Civic Life's mission of promoting a culture of civic engagement by connecting all Portlanders with each other and their government. The 311 Customer Service Program's staff will help community members find information, report issues, and request City services online, over the phone and in-person at City buildings. The 311 Program will provide information and referral services for all bureaus and will build capacity to intake and resolve service requests over time.

Equity Impacts

Portland's current dispersed customer service model can make it difficult for community members to access City information, programs and services and can result in inequitable experiences and outcomes. Residents who have a disability, do not speak English well, or have limited internet access face heightened barriers to engaging with the City. A Citywide 311 Program—which can provide easier and more convenient access— will be key to moving toward a more equitable City. Cities that have used their 311 programs to improve access, experience and outcomes for traditionally under-served and under-represented community members have reported significant increases in participation rates.

Given Portland's diverse community, and the City's commitment to equity, the Citywide 311 Program will cultivate a welcoming and inclusive customer service experience that increases equitable access and provision of City services. The 311 Implementation Plan, which will guide the creation of a Citywide 311 Program, includes the following strategies to accomplish these goals:

• Provide multiple ways to contact the City: online, by phone, via text, and in-person.
• Integrate language services, including translation and interpretation, into customer service.
• Use 311 to help streamline and improve city processes that may pose barriers to equitable access.
• Ensure program outreach and engagement prioritizes under-served and under-represented communities
• Hire diverse 311 Program staff who reflect Portland's community and who will provide an inclusive and welcoming 311 experience.
• Develop and measure performance against equity-based metrics for success.
• Ensure community member reports and requests taken by 311 are used to inform, but not determine, service delivery. Relying solely on community reports or requests may skew service delivery away from those communities who are less engaged, face more barriers, and/or are less comfortable contacting the City.

Changes to Program

In the first implementation phase (FY 2019-20), key elements to successfully establish the full Citywide 311 Program include:

a) Launching the Customer Service function to staff a new citywide customer service and reception desk at the Portland Building (scheduled to open in December 2019). The Citywide 311 Program's Customer Service staff will help community members find information, report issues, and request City services.

b) Scoping the business needs and technical requirements for a customer relationship management (CRM) or service desk tool as well as a new webform solution to support service delivery.

c) Continued project management for the implementation process.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	104,919
Personnel	0	0	0	557,186
Sum:	**0**	**0**	**0**	**662,105**
FTE	0	0	0	5.5

Resources: General Fund One-time, General Fund Ongoing - Discretionary, General Fund - Overhead, Interagency - TBP tenants, General Fund - Carryover FY 2018-19

Expenses:	Personnel, technology, process improvement, equipment, short-term space lease, implementation planning with contractor
Staffing:	New in FY 2019-20: Manager I (1 regular FTE), Customer Service Reps (2 regular FTE), Training Coordinator II (1 FTE, limited), Analyst II (1FTE, limited)
Assets and Liabilities:	None

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	John Dutt
Website:	www.portlandoregon.gov/civic	**Contact Phone**	503-865-2625

Graffiti

Program Description & Goals

As part of the Livability Program, the Graffiti Program works with Portlanders to embrace and preserve the beauty of their communities by reducing the negative impacts of graffiti vandalism. The program goals are to provide graffiti vandalism removal assistance and guidance to community members, work collaboratively with local volunteers, and support local community art projects. In fiscal year 2017-18, we partnered with more than 800 volunteers, removed eight times as much graffiti vandalism as the year before (and any year prior) through contracted services, and worked with community arts organizations to protect sixteen vulnerable murals with anti-graffiti coatings.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Timeline (days) to address graffiti incidents (receipt of complaint to resolution)	N/A	N/A	10	10	0

Explanation of Services

The Graffiti Program captures nearly 10,000 graffiti reports submitted by community members, contracted graffiti removal companies, and City staff annually. The Graffiti Program is responsible for referring graffiti reports to the appropriate property owner for removal (public and private property, alike). Reports of hate and gang graffiti are given highest priority for removal and the graffiti program dispatches these removal jobs to contractors for removal as soon as the reports are received by program staff. In fiscal year 2017-18, the Graffiti Program implemented its first proactive graffiti removal services program for private property owners. This program allows contractors to offer removal assistance to victims of graffiti vandalism when the contractors see graffiti on a property, rather than waiting for the graffiti to be reported, and/or removed.

The Graffiti Program manages three contracts for proactive graffiti removal and prevention services. These services are available to residents, small businesses (with ten or fewer employees), and nonprofit organizations in Portland. Proactive contracts are billed at a flat monthly rate instead of a per-removal basis, which has resulted in a cost-savings of approximately 50% per removal. These proactive services are particularly valuable in areas where there are higher numbers of vacant properties, which are more often targeted for vandalism, and result in neighboring locations getting vandalized more often.

Equity Impacts

The implementation of a proactive graffiti removal model has started to improve equitable outcomes for service access as contractors have been directed by our program to offer services to areas of Portland that historically have less frequently reported graffiti vandalism and/or have less frequently requested removal assistance than other areas of town.
Compliance efforts for extremely negligent property owners have been avoided for nearly five years due to lack of police investigations surrounding graffiti vandalism and Graffiti Program staffing limitations. Enforcing City Codes 14B.80 and 14B.85 against property owners and retailers when police do not have the resources to hold those committing property crimes accountable for their actions would end up revictimizing those who are already victims of vandalism. Additionally, enforcing this code through the efforts of a single staff person citywide could potentially create inequities, as having to prioritize one property over another is troublesome for the lengthy warrant/ lien process.

Changes to Program

Over the past three years, the Graffiti Program has moved from acting as a complementary program to the Police Bureau's now-defunct graffiti vandalism investigations unit to focusing on engaging more volunteers, increasing removal services, and using sanctioned street art as a strategy to celebrate and embrace the beauty of Portland's communities.

The implementation of a proactive graffiti removal program resulted in the increase of graffiti removal on private property across the city at a noteworthy cost savings to tax payers—eight times as much graffiti vandalism was removed as compared to prior fiscal years. One contract for graffiti removal is for $323,000 through FY 2021-22. Two existing contracts totaling $200,000 in FY 2018-19 will be re-bid in FY 2019-20 for three contracts up to $70,000 each totaling $210,000 to address needs surrounding hate graffiti response, mural/community art protection and restoration, and prioritize the additional new Disability/Minority/Women and Emerging Small Business contractors.

An evaluation of the current Graffiti Program codes highlighted the need for revision and re-alignment. Plans for revision are in development and the Graffiti Program is working to outline a project plan, stakeholder involvement, and timeline.

Additional changes to the Graffiti Program include the transfer of 0.5 FTE Coordinator I position to the Community and Neighborhood Involvement Center (see Neighborhood Outreach and Support program offer) and the addition of a Manager II to oversee Livability, Cannabis, Information & Referral and Business Operations.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	196,773	598,549	568,721	598,200
Internal Materials and Services	26,033	22,144	26,544	21,125
Personnel	137,943	165,809	177,158	164,882
Sum:	**360,749**	**786,501**	**772,423**	**784,207**
FTE	1.5	1.7	1.2	1.25

Resources: General Fund.

Expenses: Personnel, contracted graffiti removal services ($533,000), materials and supplies, and community service aide (seasonal staffing).

Staffing: Changes in FY 2019-20: Elimination of 0.5 FTE Coordinator I position. Addition of Manager II. See narrative under "Changes to Program."

Assets and Liabilities: There is one van associated with this program.

Program Information

Bureau: Office of Community and Civic Life

Website: https://www.portlandoregon.gov/civic/32420

Program Contact: Kenya Williams

Contact Phone 503-823-2855

Liquor Licensing

Program Description & Goals

As a part of the Livability Program, the Liquor Licensing Program is dedicated to facilitating strong relationships between community members and businesses and mitigating the livability concerns associated with the sale of liquor. The program serves as a resource for liquor license holders, State and City agencies, and community members seeking information about liquor licensing and effective strategies for collaboration and community-building. The primary goal of the program is to ensure that all liquor outlets meet the high expectations of the community, operate in accordance with local regulations, and contribute to the vitality of Portland communities.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of businesses that receive repeated Time-Place-Manner Warnings	N/A	N/A	9	0	0
Number of repeat Time-Place-Manner Warnings issued	N/A	N/A	17	0	0

Explanation of Services

The Liquor Licensing Program receives and processes liquor license applications for locations and events within the City of Portland. Although the Oregon Liquor Control Commission holds sole authority to grant, deny or restrict a liquor license, the City of Portland provides input to support their decision-making. The City of Portland collects public feedback on new liquor license applications, provides a full review of personal and location history for every annual application, collects and tracks key data on all liquor licensed establishments and facilitates issuance of the City's written recommendation on all new license applications.
The program also coordinates and leads community engagement around liquor licensing and liquor policy, tracks and monitors activities related to the sale, service and consumption of alcohol, and reviews and analyzes program metrics to identify trends and gaps in program services. The program also manages and coordinates ordinance enforcement for PCC 14B.120 and provides information and support to City leadership around liquor licensing policy.

Equity Impacts

Liquor licensing and regulation of Time, Place, Manner code has the potential to significantly impact the viability of a business, the vibrancy of a neighborhood and the earning power of a business owner. As such, all process audits and reviews conducted in this fiscal year utilized an equity and empowerment framework. Process mapping and review of core definitions were done with a focus on questioning the purpose, people involved and impacted, processes used, places impacted and benefits or burdens to communities involved. Initial outcomes of application of an equity lens to current program work have led to the prioritization of process improvements and revision of 14B. 100 and 14B.120.

Changes to Program

Population growth, increased urban density and the thriving commercial districts in Portland continue to place a strain on the capacity and resources of the liquor program. Although the number of applications received for annual licenses has held steady over the past five years the number of special event licenses received has increased by 40%, going from 1500 to 2100 processed per year.

Key internal processes for liquor licensing were mapped and evaluated for opportunities to streamline internal and shared processes. The evaluation of liquor-relevant codes highlighted the need for revision and re-alignment. Plans for revision are in development and the liquor program is working closely with key partner agencies to outline a project plan, stakeholder involvement, and timeline.

The current Coordinator I position will be elevated to Coordinator II to better implement community outreach to licensed entablements and lead the scope of work to update current liquor codes and policies. A new Manager II position will oversee the Livability, Cannabis, Information & Referral and Business Operations programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	4,132	7,284	2,866	13,400
Internal Materials and Services	48,366	46,738	56,591	52,857
Personnel	130,006	150,270	224,546	266,080
Sum:	**182,504**	**204,292**	**284,003**	**332,337**
FTE	1.6	2.35	2.35	2.44

Resources: Revenue generated from licensing fees (projected $215,000 in FY 2019-20) and general fund.

Expenses: Personnel, community service aide (seasonal staffing), local travel, supplies and minimal program expenses.

Staffing: Changes in FY 2019-20: 1.0 Coordinator II (previously I) and Manager II. See narrative under “Changes to Program.”

Assets and Liabilities: N/A

Program Information

Bureau: Office of Community and Civic Life

Website: https://www.portlandoregon.gov/civic/32419

Program Contact: Kenya Williams

Contact Phone 503-823-2855

Cannabis

Program Description & Goals

Created in 2015, the Cannabis Program works for equitable processes, policies, and outcomes for Portland's cannabis business community. Stakeholders include the public, cannabis regulators, media, and the cannabis business community.

The Cannabis Program's goals include:
• Promoting and advocating for changes in local and state cannabis policy that will support equitable outcomes.
• Assisting with local cannabis tax allocation and ensuring its support of small businesses and support workforce development.
• Convening a local cannabis policy public advisory body to guide the equitable development, implementation, and outcomes of City cannabis policies.
• Increase the number of businesses (as defined by the Cannabis Program's Social Equity Program), that self-identify as "small business," and whose owners and staff identify as having a cannabis conviction prior to July 2015.
• Continuing to be a resource for other jurisdictions with legalized cannabis to promote the development of the cannabis industry informed by social equity and good governance principles.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of cannabis applications received	N/A	167	95	50	0
No. of Cannabis licenses issued & renewed	N/A	369	385	400	0
No. of small business cannabis licensees	N/A	N/A	0	0	0
No. of cannabis licensees whose owners or staff have a cannabis conviction	N/A	N/A	0	0	0

Explanation of Services

As Oregon's largest metropolitan area, the City of Portland has an interest in supporting a central office through which local cannabis policies are enforced, Portland's cannabis-related efforts (enforcement, licensing, assistance, etc.) are coordinated, and from which our community, business owners, the State of Oregon, and other jurisdictions can find information.

The Cannabis Program serves as a convener of cannabis policy and information, administrative enforcement of local cannabis regulations, and a partner in helping cannabis businesses in Portland achieve compliance with other local and state rules and regulations.

In providing cannabis-specific information and code-related enforcement, the Cannabis Program also fills information and enforcement gaps, including with unregulated cannabis business activity, representing the City among other jurisdictions and to the state, and providing administrative responses in lieu of limited local law enforcement resources.

Specifically, the Cannabis Program:
• Staffs a local cannabis hotline to respond to and resolve inquiries and concerns about licensed and unlicensed cannabis businesses in the City of Portland.
• Ensures compliance with local regulations through inspection of cannabis businesses, convening meetings, and coordinating with other City bureaus.
• Participates in state policy and rulemaking committees and coordinates with the City's Office of Government Relations to support more equitable outcomes in cannabis policy.
• Convenes a local cannabis public advisory body. https://www.portlandoregon.gov/civic/article/557563
• Coordinates the allocation of a portion of local cannabis tax revenue.
• Share with and learn from other jurisdictions and the cannabis industry about best practices, changes, and new ideas.

Equity Impacts

The Cannabis Program takes a multi-pronged approach to address inequities and working toward a more equitable cannabis business landscape:
• Lowering barriers to entry to encourage entrepreneurs, small businesses, and those without traditional sources of capital through tiered fee structures and the Social Equity Program.
• Supporting a statewide framework for social consumption of cannabis (enforcement of public consumption has disproportionately impacted communities of color).
• Allocation of $1.4 million of local Recreational Cannabis Tax Fund revenues for FY 2019-20 to support community grants for criminal expungement and record clearing, workforce development, and small business support, particularly for business owners and communities of color. • Reimplementing Portland's cannabis public advisory body (Feb. 2019) that will provide input regarding equitable access and outcomes with Portland's cannabis policies. Requirements for membership include experience as an advocate for racial equity and inclusion, and working successfully with diverse stakeholders and Portland communities

Changes to Program

The Cannabis Program has been affected by the rescission of the "Cole Memo" which provided guidance to Federal law enforcement relating to cannabis issues, changing state laws and policies, a change in the Commissioner-In-Charge of the bureau, bureau leadership, and other changes.

External factors such as cannabis market saturation and the decrease in the wholesale price of cannabis will require the program to continue adapting and changing over time.

In part because of these factors, the Cannabis Program will change in the following ways in FY 2019-20:
• Reclassify an Office Support Specialist (OSS) II position to an OSS III
• Add 0.5 FTE communications capacity. This position will be combined with a 0.5 FTE Administrative Specialist III position within Administration.
• Take on more responsibility for allocating a portion of Portland's local cannabis tax revenue
• Make changes in City code to reflect changes in State rule and "code cleanup" for ease of reference and to reflect best practices learned since implementing PCC 14B.130.
• A new Manager II position will oversee the Livability, Cannabis, Information & Referral and Business Operations programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	29,651	54,654	65,664	1,448,350
Internal Materials and Services	104,689	122,837	143,832	143,003
Personnel	700,018	762,437	866,271	1,093,182
Ending Fund Balance	0	0	1,094,858	0
Sum:	**834,358**	**939,928**	**2,170,625**	**2,684,535**
FTE	8	8.5	9.6	10.35

Resources: The Cannabis Program is entirely funded by the application and license fees paid by cannabis businesses in Portland. A market study of Portland's cannabis business landscape is being conducted in FY18-19 to have a better sense of how many businesses will be operating in Portland in the coming years. This will have a direct impact on future budgeting decisions, including whether to request the creation of new positions or allocating resources differently to meet program needs.

Expenses: Personnel, technology, local travel, language and other accommodations, and expenses related to code enforcement.

Staffing: Changes in FY 2019-20: OSSIII (previously II); Administrative Specialist III (Communications role); and Manager II. See narrative under "Changes to Program."

Assets and Liabilities: There are three vehicles associated with this program. The Cannabis Program currently has about $1.0 million in a special reserve, held over from budget surpluses from previous fiscal years. This money will not be used until and unless a need arises from lack of revenue from application and license fees.

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	Brandon Goldner
Website:	https://www.portlandoregon.gov/civic/67575	**Contact Phone**	503-823-4462

Noise

Program Description & Goals

As a part of the Livability section, the Noise Program works to improve neighborhood livability by enforcing the City's Noise Code, Title 18, while permitting vibrant events and construction through noise variances. A goal of the Noise Program is to work proactively to educate the community about sound and acoustics in the city to reduce noise complaints by helping community members problem solve issues before officially filing a noise complaint.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of repeat complaints citing chronic noise complaints	N/A	N/A	129	230	0

Explanation of Services

The Noise Program exists to solve noise concerns in the community, issue noise permits to allow vibrant cultural events in the City, and to assist development and infrastructure work to happen outside of typical business hours when necessary. The Noise Program receives 600-700 noise variance requests annually ranging from block parties to construction projects. Noise variances are a major part of the work for the staff and accounted for $275,286 dollars to support the program in FY 2017-18. For variance requests that last for more than a year, the Noise Program works with a volunteer Noise Review Board that meets once a month to set conditions for projects that reduce community impacts.

Equity Impacts

The current complaint based system has empowered the voices of some community members while creating a barrier for others. Often, more time is spent addressing issues that do not affect a diverse range of community members, and many times, do not elevate to any violation of Title 18. Staff is currently beginning to hold sound workshops across the City to educate and inform, and to develop relationships with different communities in different regions of Portland. Noise Office staff is also exploring the translation of key documents in the nine harbor languages.

Changes to Program

The Noise Program is in a unique transition point in its history. As the City grows, the small number of noise staff must innovate and move their focus from the past that had a focus on enforcement and more permitting requirements, to a new direction in Civic Life that places a focus on education and community building.
The Noise Program will be striving to reduce the number of noise cases that need to be open by using more mediation and education to resolve neighbor to neighbor type disputes and those with businesses and their residential neighbors such as night clubs.
An evaluation of City's Noise Code, Title 18, highlighted the need for revision and re-alignment. Plans for revision are in development and the Noise Program is working to outline a project plan, stakeholder involvement, and timeline.
In FY 2019-20, a new Manager II position will oversee the Livability, Cannabis, Information & Referral and Business Operations programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	17,874	12,543	31,282	17,550
Internal Materials and Services	69,716	66,664	71,252	84,815
Personnel	388,064	441,501	421,104	525,771
Sum:	**475,654**	**520,708**	**523,638**	**628,136**
FTE	4.4	4.45	4.45	4.56

Resources: Revenue from variance application fees (increased annually by 5% as permitted by City Code), citations and General Fund dollars. Historically, revenue has been less than 50% of program expenses. The amount of revenue raised from variance fees is reflective of trends in the construction industry. At the time of budget submission, we have received 36% in revenue at 50% of the year, e.g., $90,000 of $250,000 projected for the year (with a projected $80,000 shortfall). In FY 2019-20, revenue is projected at $180,000 reflecting a decline in the construction boom.

In addition, revenues for the Noise Program are limited to an extent due to the lack of a citation fee update since August 2001. We will revisit a new citation fee structure after we have updated the Title 18 Noise Code.

Expenses: Personnel, community service aide (seasonal staffing), equipment maintenance, local travel, public notices, and program expenses.

Staffing: Changes in FY 2019-20: Manager II. See narrative under "Changes to Program."

Assets and Liabilities: The Noise Program owns five noise meters in good working order. There are two vehicles associated with this program.

Program Information

Bureau: Office of Community and Civic Life

Website: https://www.portlandoregon.gov/civic/63242

Program Contact: Kenya Williams

Contact Phone 503-823-2855

Constructing Civic Dialogues

Program Description & Goals

As part of the Community & Neighborhood Involvement Center, the Constructing Civic Dialogues (formerly Neighborhood Mediation) program was -renamed and redesigned in 2018 to both complement neighbor-to-neighbor mediation services and expand it.

The program's purpose is to use upstream models to foster understanding of differing perspectives, generative public dialogue, and constructive conflict to lay the foundations for a Portland where we all belong.

Through a competitive grant process, the goals are to:
• Support culturally and linguistically specific organizations to create more holistic community dialogues.
• Support tool development for culturally appropriate conflict resolution for City employees and the public.
• Support development of trainings for City employees and the public
• Provide neighbor-to-neighbor mediation.

Civic Life will develop new performance measures for this program in time for budget development for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

FY 2018-19 built upon the program's decades-long investment in neighbor-to-neighbor mediation provided by Resolutions Northwest (reporting 89 closed mediation cases in FY 2017-18) with the addition of five community partners to serve an additional 1,600 people through 73 opportunities for training, dialogue, conversation, services and events.

New programs partners in FY 2018-19 are: the AORTA Collective, Disability Art & Culture Project, Oregon Humanities, Training 4 Transformation, The Vanport Mosaic. These grants were from January 1, 2019 to June 30, 2019 with an intention to renew the contract for an additional two years based on the delivery of mutually agreed upon services.

Services and trainings are offered free of charge through City of Portland networks so that community members that are part of City networks are better resourced to engage with their neighbors, members, and each other, and City employees are better equipped to engage constituents. These networks include City bureaus, programs, advisory boards and commissions and existing community partners such as neighborhood coalitions and diversity and civic leadership partners.

Civic Life staff will support outreach and engagement of participants for the trainings. Language and other accommodations will be available for each of these opportunities. Program information will be distributed through City communications, available on the Civic Life website and through social media.

Performance metrics are currently being developed for with grant-funded partners.

Equity Impacts

Portland's population has changed over the last thirty years. Portland has become more diverse, bringing people with varying life experiences, languages, abilities to intersect with each other in ways not experienced before. Additionally, with rapid population growth and density increase, we are physically closer together than ever before.

This program aims to bridge conversations and support creating spaces for dialogue between people across generational divides, racial lines, language barriers, geographic boundaries and more. Working "upstream," this program is engaging more people in how to engage in constructive conflict and how to understand their own biases and community or institutional barriers, so issues are addressed in more constructive ways. Additionally, this program will provide multilingual services in a culturally appropriate way. The work is centered on those who need it most, who have not always had the access to City services, and whose populations may be overrepresented in conflicts because of implicit and explicit biases.

Changes to Program

The Constructing Civic Dialogues program evolved from funding neighbor-to-neighbor mediation exclusively to a broader range of services that invests in the capacity of community members to go "upstream." This means providing people better tools and training at engaging each other long before third-party mediation is needed. As our city continues to diversify, this new model hopes to help build bridges in communities of various cultures, ages, abilities and races. Helping construct ways of disagreeing without divisiveness will help Portland be a more welcoming place for all. As before, the entire budget for FY 2019-20 is for grants to community partners. Additional program partners will be added to the cohort in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	252,386	130,359	268,539	242,349
Sum:	**252,386**	**130,359**	**268,539**	**242,349**

Resources: General Fund.

Expenses: Grants to community partners to provide training and services at no cost to community and City networks.

Staffing: There has never been dedicated staff for this program. In previous years, staffing was limited to executing a single contract for the total program amount to one organization without program oversight. In FY 2018-19, the expansion of the program was temporarily added to the existing responsibilities of the Portland United Against Hate Coordinator and Management Analyst. The staffing for this program in FY 2019-20 will be through the Grants Coordinator position at the East Portland Community Office so no additional staffing expenses are reflected here.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Community and Civic Life

Website: https://www.portlandoregon.gov/civic/60549

Program Contact: Dianne Riley

Contact Phone 503-823-3075

Diversity & Civic Leadership

Program Description & Goals

As a part of the Community & Neighborhood Involvement Center (CNIC), the Diversity & Civic Leadership (DCLs) program offers grants to community partner organizations to provide Portlanders with a more equitable political landscape through leadership development opportunities and culturally appropriate civic engagement training. FY 2018-19 partners are: Immigrant & Refugee Community Organization (IRCO), Latino Network, Momentum Alliance, Native American Youth & Family Center, Unite Oregon, and Urban League. These same partners will continue through FY 2019-20.

For more than a decade, this program has supported vast numbers of leaders and in many cases, has been the catalyst to launching a specific community's participation in all levels of government. The DCLs program is now positioned to offer more advanced opportunities. Future grants will allow more flexibility for leadership engagement as well as leadership development, such as collaborative efforts where DCL alumni support emerging DCL leaders in doing specific projects. These projects might include but are not limited to: partnering on trainings with Community-Neighborhood District Coalitions, advancing resilience efforts and emergency preparedness, and/or outreach to "hard to count communities" for the 2020 Census.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of new partnerships with community groups	N/A	N/A	5	5	0

Explanation of Services

Portland's investment in the DCLs program is yielding significant impact as the metropolitan region responds to increasing pressures to adapt, grow, and change in an increasingly complex socio-economic, political and climate-impacted environment. These pressures are building even as our City works to evolve responsibly beyond the historic limitations of oppressive ideologies and practices such as Manifest Destiny, colonialism, and capitalism fueled by slavery and patriarchy. DCL leaders and their networks offer fresh perspectives and innovative ideas for addressing collective concerns and a legacy of pain and suffering.

On the whole, current and emerging generations of Portlanders share a democratic vision of a fair and shared society. The DCL program creates a powerful partnership between culturally specific organizations and the City of Portland to deliver movement toward that vision.

The result is an iterative, collective process that is at its core the process of democracy itself. Going forward we anticipate that the DCLs will continue to add additional civic participation elements to their collective work, from non-partisan and content-neutral activities like the 2020 Census and "Get Out The Vote (GOTV)" efforts to their active participation on City boards, commissions and other leadership bodies.

Equity Impacts

DCL leaders, alumni and partnering organizations have and continue to shape more equitable, just and healthy outcomes for all Portlanders. By partnering with communities through community-based organizations and community-directed programming, the DCL program is able to provide:

• Infrastructure for a tailored, population-specific approach to leadership development, that better addresses the needs of under-served and underrepresented Portlanders.
• Civic education and enrichment vital to advancing a robust and healthy democracy.
• Curriculum that advances an awareness of social justice issues.
• Deep social integration of each cohort to create strong ongoing support of emerging City leaders.
• Analysis and practices that confront racism, sexism, homophobia and other oppressions.
• Exploration and developing understanding of leadership qualities that uplift the whole of society.
• Ongoing restructuring will result in more partnerships and stronger representation among under represented communities and constituencies.

Changes to Program

As its sole focus, the DCL program has produced strong and diverse leadership for City government as well as fed the creativity, collective wisdom and civic profile of various communities throughout the Portland region and beyond.

Twelve years in, it is reasonable to expect this program to become a driver of results—results that can only be achieved through Community-City partnerships. In FY 2018-19, the previous Neighborhood Program Coordinator (a position classification unique to Civic Life in the City) was reclassified and is now a Coordinator II (Civic Engagement) position. This position now manages both the DCL and District Coalition grants for the bureau, leveraging the power and assets of both cohorts to work more collaboratively within and across programs with the potential to address citywide and systems change.

In FY 2019-20, Civic Life, DCL, District Coalition and other community partners will discuss strengthening the impact of this program, including but not limited to opening future funding in FY 2020-21 through a competitive process. There is reason and need to expand our number and types of partnership to include additional communities and support the development of emerging communities while valuing current partners.

In FY 2019-20:
• The CNIC Supervisor I position will be reclassified as Manager II. This position will oversee the Adapt to Impact, DCL, Neighborhood Outreach and Support, Immigrant and Refugee and Youth programs. This position is reflected in the program offer for Neighborhood Outreach and Support.
• The Civic Engagement Coordinator II and Manager II will also devote a portion of their time to the bureau's efforts toward the 2020 Census. The direction to develop and FY 2019-20 decision package is submitted describing the Census 2020 work.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	864,728	852,348
Internal Materials and Services	0	0	11,882	5,956
Personnel	0	0	111,972	56,120
Sum:	**0**	**0**	**988,582**	**914,424**

	FTE	0	1	0	0.5

Resources: General Fund.

Expenses: Personnel, grants to community partners ($851,648), food, language and other accommodations, local travel, equipment and program expenses.

Staffing: See Changes to Program section.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	Dianne Riley
Website:	https://www.portlandoregon.gov/civic/45147	**Contact Phone**	503-823-3075

Neighborhood Outreach & Support

Program Description & Goals

As part of the Community and Neighborhood Involvement Center (CNIC), the Neighborhood Program broadens channels of communication between the public and City officials, increases community participation in public decision-making, and supports community-driven projects. Seven geographically designated District Coalition Offices work with the 94 geographic-based neighborhood associations and communities of identity and interest. These programs contribute 125,000 volunteer hours annually.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of new partnerships with community groups	N/A	N/A	5	5	0

Explanation of Services

The Coalitions provide a range of services to communities of geography, interest and identity. Five nonprofit Coalitions—Central Northeast Neighbors (CNN), Northeast Coalition of Neighbors (NECN), Neighbors West-Northwest (NWNW), South East Uplift (SEUL) and Southwest Neighbors Inc. (SWNI) are supported by grants from the City of Portland to meet those community needs. Two are City-staffed offices, East Portland Community Office (EPCO) and North Portland Neighborhood Services (NPNS) which parallel the work of the nonprofits.

Services and support include:
• Convener: Convene stakeholders to identify issues or topics to address in their communities.
• Community organizing: coordinate efforts to resolve and advance critical community-identified issues.
• Community outreach: share information to connect to city programs and services.
• Information and referral: Respond to a wide variety of inbound queries from the public regarding City and other public and nonprofit agencies' functions and contacts.
• Technical assistance: provide advice on how to establish and maintain an organization, project management, facilitate group processes, adhere to nonprofit regulations etc.
• Fiscal support and administration: provide fiscal sponsorship to neighborhood associations and other community groups to access grant funding opportunities.
• Grants administration: offer grants that support civic engagement and community building projects and activities.
• Insurance coverage: provide liability insurance coverage for community groups and their projects and activities.
• Capacity Building: develop and implement trainings and workshops to meet community capacity-building needs.
• Dispute resolution: help neighborhood associations navigate the grievance processes and refer to mediation services when needed.
• Event & meeting space: free access to meeting and event rooms.
• Event equipment loan: picnic equipment, audio/visual systems, interpretation equipment, etc.

Equity Impacts

Recognizing historical inequities, Civic Life is pivoting to better serve underserved, under-resourced, and/or marginalized communities through district coalitions while continuing to support neighborhood associations. Civic Life will continue to identify service gaps and redirect funding aimed at increasing the engagement of and partnerships with communities of identity and interest. For example, Civic Life administers an Accommodations Fund to which district coalitions can apply to provide language, childcare and other accommodations for populations to engage civically.
In FY 2018-19, Civic Life redirected resources to increase staffing from 2.275 FTE to 3.7 FTE to better engage immigrants, refugees, people of color, low income families and people with disabilities in East Portland.

Changes to Program

In FY 2018-19, the individual in the Coordinator III position at NPNS will retire after decades of outstanding service to Portland. In FY 2019-20, this position will be repurposed and contribute to the addition of a Manager II position for the bureau (see Administration program offer) and to increase two part-time Coordinator I positions at NPNS from 1.18 FTE to 2.0 FTE to maintain (and slightly increase) staffing levels. The Coordinator III position at EPCO will be reclassified as a Supervisor II position and will oversee both NPNS and EPCO which have a combined 5.7 FTE.
In FY 2019-20, the CNIC Supervisor I position will be reclassified as Manager II. This position will oversee the Adapt to Impact, Diversity and Civic Leadership, Neighborhood Outreach and Support, Immigrant & Refugee and Youth programs. This position is reflected in the program offer for Neighborhood Outreach and Support.
This program offer also reflects the transfer of 0.5 FTE Coordinator I position from the Graffiti program to the Community and Neighborhood Involvement Center.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	2,948,726	3,091,592	2,478,349	2,582,134
Internal Materials and Services	172,565	279,259	129,364	118,517
Personnel	1,352,363	1,354,837	1,230,893	980,547
Ending Fund Balance	-22,310	-22,310	0	
Sum:	**4,451,344**	**4,703,378**	**3,838,606**	**3,681,198**
FTE	12.1	12.09	9.03	8.2

Resources: General Fund

Expenses: Personnel, district coalitions ($2,479,804), local travel, language and other accommodation, food and other program expenses.

Staffing: Changes in FY 2019-20: Two Coordinator II positions increased to full time; Supervisor II (previously Coordinator III); Coordinator III eliminated/ repurposed for other bureau positions; Coordinator I (from 0.5 to 1.0 FTE). Manager II (previously Supervisor I). See narrative under “Changes to Program.”

Assets and Liabilities:	N/A

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	Dianne Riley
Website:	https://www.portlandoregon.gov/civic/28989	**Contact Phone**	503-823-3075

Immigrant & Refugee

Program Description & Goals

As a part of the Community & Neighborhood Involvement Center (CNIC), the Immigrant & Refugee Program has previously been known and developed as the New Portlanders Program. Moving forward as the Immigrant & Refugee Program, this body of work will continue with the on-going and critically important advocacy efforts needed to support integration services helping new arrivals navigate local institutions, find the supports they need, and settle-in to being vital participants in the shaping of this city. Further, this program will seek to ensure that as public services and resources come online or are updated, that they reflect the reality of having a multicultural population in Portland and strive to serve all Portlanders. Concretely, this means eliminating barriers of access including but not limited to language. It also means addressing the assumption that a particular culture holds primacy and should be used as the standard for normalcy and acceptance. “Integration” need not be guided by any imperative to surrender, abandon, or eliminate an aspect of oneself or culture, but rather to adapt and to grow into a self that can flourish in the local setting of Portland. To this point, the Immigrant & Refugee Program offers a nuanced approach ensuring the City of Portland develops and maintains a deeply intersectional, holistic, multicultural and increasingly more strategic stance toward fulfilling the vision, potential and promise of democracy.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of new partnerships with community groups	N/A	N/A	5	5	0

Explanation of Services

Although this program is evolving, under the previous-New Portlanders program it has been comprised of four main areas of work:

Families Move program. Public education through local media, schools, big employers, civic, faith, and professional associations on the inevitability and the benefits of human migration, including globalizing economies, the refugee & immigrant crisis, resettlement realities, and support and creation of welcoming and well-informed communities.

Equity in Practice program. Working and collaborating with City bureau/immigrant community partnerships designing, developing, and delivering services with greater focus on underserved East Portland neighborhoods (e.g. Portland Parks & Recreation's Mobile Playgrounds, Portland Bureau of Transportation's Safe Routes to School, Bureau of Environmental Services Community Gardens, flood plains, Portland Police Bureau's community policing, Portland Bureau of Emergency Management NET training, and Office of Management and Finance budget panels).

CELs (Community Engagement Liaisons) program. City bureaus outsourcing their outreach to community elders and activists trained by Community & Civic Life's Diversity and Civic Leadership programs and/or Coalition of Communities of Color civic engagement leadership programs. Ninety percent of the liaisons have been trained in these leadership programs. Facilitation, project lead services, cultural contextualization, and subject matter expertise is provided through fee-for-service contracts.

New Portlander Policy Commission. In partnership with elected leaders and bureau managers, the Commission advise on priorities and goals setting for newcomer integration through the development of policy and practice recommendations for improving immigrant and refugee integration.

Equity Impacts

The Immigrant & Refugee program emerges out of equity concerns expressed in these communities about how they would like to engage the City. The program continues to develop the tools to address equity needs of these communities and the whole of Portland.
Currently, the program includes:
• Developing infrastructure for a tailored, population-specific approach to leadership development, that addresses the particular needs of immigrants and refugees from a wide variety of backgrounds.
• Increasingly broad, supportive and more inclusive recruitment of representation on the New Portlander Policy Commission from more immigrant and refugee communities.
• Development of a policy agenda that voices needs and aspirations of policy stakeholders that may otherwise be unacknowledged.
• Civic education and practice vital to advancing a robust and healthy democracy.
• Exploration and developing understanding of leadership qualities that uplift the whole of society.

Changes to Program

Creators and leaders of this program have long held the vision of producing research and analysis focused on immigrant and refugee populations to better serve these populations. This is a significant omission in the work to date within this program. Staff transition within this program offers the opportunity to recruit for a broader skill set that includes but is not limited to research, data collection and visualization, policy analysis and presentation of information, and other leadership skills. Expanded skill sets are required to meet community and program expectations for outputs and delivery of services. In FY 2019-20, we will redesign the Immigrant & Refugee program to better support these functions, including the elevation of 1.0 FTE from Coordinator II to Supervisor II to oversee the newly created Adapt to Impact program and the other 1.0 Immigrant and Refugee Coordinator I. As referenced in the Adapt to Impact program offer, the integration of immigrant and refugee perspectives within Adapt to Impact will be developed in FY 2019-20 and implemented in FY 2020-21.

In FY 2019-20, the CNIC Supervisor I position will be reclassified as Manager II. This position will oversee the Adapt to Impact, Diversity and Civic Leadership, Neighborhood Outreach and Support, Immigrant and Refugee and Youth programs. This position is reflected in the program offer for Neighborhood Outreach and Support.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	18,491	22,198	22,328	10,300
Internal Materials and Services	20,050	17,980	28,155	12,768
Personnel	107,083	109,960	198,856	213,630
Sum:	**145,624**	**150,138**	**249,339**	**236,698**
FTE	1	2	2	1.5

Resources: General Fund.

Expenses: Personnel, local travel, food, community engagement expenses and other program expenses.

Staffing: Changes in FY 2019-20: Supervisor II (previously Coordinator II). See narrative under “Changes to Program.”

Assets and Liabilities: N/A

Program Information

Bureau: Office of Community and Civic Life

Website: https://www.portlandoregon.gov/civic/62226

Program Contact: Dianne Riley

Contact Phone 503-823-3075

Youth

Program Description & Goals

As a part of the Community & Neighborhood Involvement Center, the Multnomah Youth Commission (MYC) is the official youth policy body for the City of Portland and Multnomah County. To date the City of Portland's Youth program has revolved around developing an official channel to distill and amplify youth perspectives on critical City policy significantly impacting and relevant to youth and their quality of life. Founded by youth in 1996 as the Youth Advisory Board for Multnomah County and transitioning to a Commission in 2002, the MYC is a joint program of the City of Portland and Multnomah County per an intergovernmental agreement adopted in 2008. The MYC is a group of up to 42 young people, ages 13-21, who bring youth voice into government, change policy affecting young people, and shift negative community perceptions about youth.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of new partnerships with community groups	N/A	N/A	5	5	0

Explanation of Services

The MYC has is a diverse group of youth organizers dedicated to equity and justice, representing youth who live, work, or attend school in Portland and Multnomah County. All MYC work is guided by Our Bill of Rights: Children + Youth, the nation's first bill of rights written by and for youth, created by the MYC in 2006. The MYC has developed a community-organizing model that incorporates participatory action research, policy creation and advocacy, and Youth-Adult Partnership as its foundational underpinnings.

MYC's three current major policy focus area were selected through youth outreach and all work is driven and led by youth themselves:
• Youth Against Violence committee focused on eliminating police and gang violence, bullying, and sexual and dating violence.
• Sustainability committee focused on transit justice issues and expanding Trimet's Youth Pass program region-wide.
• Education/Youth Voice committee organizing candidate forums and working to combat chronic absenteeism by pushing back high school start times to 8:45 a.m. or later.

Equity Impacts

The Youth program has developed a robust proactive approach to equity that includes:

• Infrastructure for a tailored, population-specific approach to leadership development, that addresses the particular needs of Youth coming from a wide variety of backgrounds.
• Supportive recruitment of Youth from under-served and underrepresented populations.
• Development of a policy agenda that voices needs and aspirations of policy stakeholders that may otherwise be unacknowledged.
• Civic education and enrichment vital to advancing a robust and healthy democracy into the near and distant future.
• Curriculum that advances an awareness of social justice issues.
• Deep social integration of each cohort to create strong ongoing support of each MYC commissioner.
• Analysis and practices that confront bullying behaviors, internalized oppression, racism, sexism, homophobia and other oppressions.
• Expectations for self-reflection and personal growth.
• Exploration and developing understanding of leadership qualities that uplift the whole of society.

Changes to Program

The Youth program provides an exceptionally clear model for why developing structures for specific Portland populations is important in the cultivation of institutions that serve all; and it is also a model for how to do it well. As a collaboration between City of Portland and Multnomah County, the Youth program is supported by a stable partnership which buffers it from some of the change factors that may impact other programs. Hence, changes to this program can be driven by proactive long-term strategy created through our City-County collaboration as opposed to unanticipated or unwelcome influences. In FY 2019-20, we will be contemplating ways to scale up MYC successes to support a broader segment of the Youth population more directly.

In FY 2019-20, the CNIC Supervisor I position will be reclassified as Manager II. This position will oversee the Adapt to Impact, Diversity and Civic Leadership, Neighborhood Outreach and Support, Immigrant and Refugee and Youth programs. This position is reflected in the program offer for Neighborhood Outreach and Support.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	17,679	20,200
Internal Materials and Services	0	0	12,536	10,386
Personnel	0	0	105,535	121,067
Sum:	**0**	**0**	**135,750**	**151,653**
FTE	1	1	1	1

Resources: General Fund. Multnomah County also invests in the MYC independently through staffing and program expenses.

Expenses: Personnel, community service aides (temporary positions), program expenses for food, transportation/travel, accommodations and other youth-related supports.

Staffing: See Changes to Program section.

Assets and Liabilities:	N/A

Program Information

Bureau:	Office of Community and Civic Life	**Program Contact:**	Dianne Riley
Website:	https://www.portlandoregon.gov/civic/66155	**Contact Phone**	503-823-3075

Crime Prevention

Program Description & Goals

The Crime Prevention Program goal is to address public safety, reduce fear of crime, and build resilient, connected communities through community organizing and providing public safety trainings and consultations. In FY 2019-20, this 13-person team includes 10 Crime Prevention Coordinators divided into three teams, each of which serves neighborhoods in the different police precincts. Four key indicators are used to measure our work—the number of community block-level (previously referred to as “watch”) groups supported by our teams, the number of CPTEDs conducted by our teams, the amount of public safety knowledge Portlanders gain by participating in our trainings, and neighborhood-level engagement with “National Night Out” events.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of community groups supported (neighbors, businesses, community involvement groups)	324	70	500	425	0
Number of Crime Prevention Through Environmental Design (CPTED) assessments completed (previously Site Security Assessments)	93	35	60	50	0
Percentage of crime prevention training participants with increased knowledge of public safety resources	N/A	N/A	70.00%	80.00%	100.00%
No. of National Night Out events supported	N/A	N/A	0	225	0
Percentage of Neighborhood Associations participating in National Night Out events	N/A	N/A	0	57.00%	100.00%

Explanation of Services

The Crime Prevention Program was developed to help reduce fear of crime and help address public safety and livability issues by providing prevention education and outreach, facilitating community building, and helping bridge community-police partnerships. Portland is unique in that this program is not housed within the police agency as it is in cities nationwide.

The three key services that the Crime Prevention Program offers Portlanders are:
• Multi-lingual and multicultural community organizing and providing public safety trainings to address a wide range of public safety and livability problems. Some groups focus on crime and livability issues on specific blocks. Other groups focus on parks, apartment buildings, or business districts.
• Consulting on crime prevention through environmental design (CPTED) assessments provided to home or business owners at no cost. CPTEDs offer advice on how to make their properties less appealing targets for crime. Social science research has consistently shown that CPTEDs are an efficient and cost-effective strategy for reducing crime.
• Organize, coordinate and staff Portland's annual National Night Out events. The purpose of these events is to promote community cohesiveness and provide residents with an opportunity to meet their local public safety officials. Every year, more than 20,000 people in Portland participate in National Night Out events throughout the city.

This program is best suited to address public safety and resiliency at a block-level by connecting neighbors through neighborhood block groups, building community, and providing crime prevention education. In addition to public safety training, we also work with other bureaus to incorporate emergency preparedness awareness, such as public alerts, Basic Earthquake Emergency Communication Nodes (BEECN), and Neighborhood Emergency Teams (NET). We are actively working with the Portland Bureau of Emergency Management (PBEM) to establish a partnership between block-by-block groups and the NETs.

The Crime Prevention Program services help Portlanders become less susceptible to property crime, better informed about public safety resources, empowered in addressing public safety issues collaboratively in their communities, and more resilient and prepared for emergencies.

Equity Impacts

Public safety is an urgent equity issue. Marginalized communities are most likely to be impacted by crime and least likely to ask for assistance from government or their neighbors. Portland's Crime Prevention Program is committed to disrupting that dynamic. Our mission includes offering public safety services to all Portlanders. To achieve that goal, we have assembled a diverse staff, who allow us to proactively reach out to underserved communities. For example, nearly half of our staff can deliver services in a language other than English.

We are also committed to evolving public safety services for the 21st century. Historically, crime prevention programs have been based on theories of policing which emphasize surveillance and exclusion ("Neighborhood Watch" see here and attached: NW article https://www.wbez.org/shows/wbez-news/does-new-neighborhood-watch-reduce-crime-or-create-residentcops/6e96cf86-2f15-44a9-ad82-fd5cbd4451aa and Proj Alert article https://longmontobserver.org/lifestyle/alternative-neighborhood-watch-project-alert-loving-environment-requires-tending/). As our communities evolve, these approaches no longer work to provide inclusive service delivery, nor produce equitable outcomes. Because of this dynamic, our program is in the process of developing an innovative approach to crime prevention. Our new model emphasizes block-level organizing which connects neighbors to each other and to their government, promotes leadership development in our neighborhoods, creates partnerships on wide variety of public safety, emergency preparedness and civic engagement projects, and expresses our commitment to equity and inclusion.

Changes to Program

Demand for services has increased as communities' sense of safety have shifted due to issues related to the housing crisis, lack of mental health services, bias crimes and an increase in petty crime. For some communities, fear of government is a barrier to services. Another factor in public safety is capacity building for emergency preparedness and resiliency. Crime Prevention's shift will be to focus on public safety more holistically and proactively by developing key partnerships such as PBEM, Fire Bureau, Portland Bureau of Transportation (PBOT)'s Safe Routes and Vision Zero Programs. In FY 2018-19 we transitioned to a new team structure and joined forces with the one-person Neighborhood Program supporting neighborhood associations. This position also supervises five crime prevention staff. The transition will increase capacity and equity in working with all community partners, including businesses and other community groups.

In FY 2019-20, one FTE previously focusing on communications activities and technical support will be reclassified to create a communications position bureau wide and for other bureau efficiencies. The existing Office Support Specialist II will be reclassified to an Office Support Specialist III position to reflect expanded functioning for that role.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	51,995	20,411	7,942	92,650
Internal Materials and Services	192,239	165,974	170,635	174,293
Personnel	1,202,455	1,217,633	1,289,962	1,436,622
Sum:	**1,446,689**	**1,404,018**	**1,468,539**	**1,703,565**
FTE	13	13	14	13

Resources: General Fund.

Expenses: Personnel, program development, food, local travel, and language and other accommodations, community outreach and program expenses.

Staffing: Changes in FY 2019-20: Elimination/reclassification of 1.0 FTE Crime Prevention Coordinator. OSSIII (previously OSSII). See narrative above under "Changes to Program."

Assets and Liabilities: There are two vehicles associated with the program.

Program Information

Bureau: Office of Community and Civic Life

Website: https://www.portlandoregon.gov/civic/28395

Program Contact: Meg Juarez

Contact Phone 503-823-2030

Inclusive Business Resource Network

Program Description & Goals

From tech startups to neighborhood retail, small businesses are vital to the city's economy. The Inclusive Business Resource Network is a citywide program that brings multiple services for small business into a single network to provide greater efficiencies and cross-functional innovation. The Network leverages the power of partnership to increase the success of underrepresented entrepreneurs.

The outcomes and program portfolio were designed with an emphasis on supporting a business through growth and ensuring technical assistance leads to wealth creation for disadvantaged entrepreneurs (people of color, women founders and low-income business owners). This program began in FY 17-18 with the following five-year goals:

• 1000 Strong and Stable business owners, who have established a foundation for the future and receive a benefit from their business.
• 250 Growth businesses, who have realized efficiencies in ordering, operating, and/or production.
• 25 Scale businesses, who have a market-proven product or service and are investing in the expansion of their business footprint.
• 100 Getting ready to Launch traded sector startups, who are aspiring entrepreneurs that move past concept and launch a product or technology into a new market.

This program is a multi-year support program and expectations are that businesses take multiple years to stabilize and prepare for growth. Therefore, actuals for FY 17-18 are lower than targets for future years.

The network provides wrap around support for entrepreneurs such as legal support, accounting, and market research. Services that integrate with the network include the Mercatus platform and My People's Market.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
25 Businesses Invest in Expansion in 5 Years	0	1	4	8	25
100 Startup Businesses Launched in 5 Years	0	12	25	55	100
# of Businesses Receiving Light Touch Technical Assistance	0	513	400	400	0
Number of Businesses Receiving Long Term Technical Assistance	1	370	1	400	0

Explanation of Services

Through focused resources, collaboration and client-centered services the Network seeks to drastically shift outcomes for business owners of color, immigrants, women founders, and other underrepresented minorities.

The Network meets monthly and works collaboratively with Prosper Portland to seek out innovative solutions. It operates as an integrated system delivering both long term and light touch general business advising as well as specialized services. Long-term business advising includes one on one and peer to peer learning opportunities in facilitated group cohorts and making connections to industry mentors. Business navigators and drop in centers within Neighborhood Prosperity Districts ensure cultural and geographic diversity, with business advising for up to 10 hours and referrals to long term programs within the network. Additionally, the Network includes i) the Mercatus platform, a website that provides a directory and storytelling platform for entrepreneurs of color; ii) My People's Market, which is done in partnership with Travel Portland and is in its second year of providing a space for entrepreneurs of color to sell their goods; iii) a portfolio of business finance programs to increase access to capital such as micro loan products, seed funding and business loans; and iv) specialized services such as legal support, accounting and market research. Approximately 700 businesses are served through the Network each year, and 400 businesses – 65% owned by women and 75% owned by people of color – receive long-term support (30+ advising hours a year).

In February 2017, Prosper Portland issued Requests for Proposals (RFPs) to select providers for the Network. Diverse selection committees reviewed the proposals and forwarded their recommendations for selection to Prosper Portland. The full RFP process involved significant outreach and input from existing providers and other entities interested in IBRN. Ongoing and regular feedback from partners and clients is important to the success of IBRN and is collected in the following ways:

• IBRN partners complete feedback forms after each monthly Network meeting.
• Prosper Portland staff conduct an annual survey of IBRN clients.
• Network providers have formed committees on various topics to advise Prosper Portland staff on the overall program.
• Prosper Portland contract managers meet regularly with each IBRN partners to get updates on the partner's services and suggestions for improvement.

Equity Impacts

The Inclusive Business Resource Network is directed toward those who have been historically underserved. 75% of businesses in the Network are owned by people of color and 65% are owned by women. Network providers participate in equity training to further develop culturally-responsive business coaching practices. The majority of business advisors in the Network are people of color.

Changes to Program

The Network's services in FY 19-20 are anticipated to be funded at approximately 91% of the current FY 18-19 budget ($3,247,525), which is made up of General Fund, Community Development Block Grants (CDBG) and other Prosper Portland resources. Cuts include one-time funding from other Prosper Portland resources ($255,184).

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	1,340,225	2,238,415
Sum:	**0**	**0**	**1,340,225**	**2,238,415**

Resources: • General Fund: Prosper Portland's portion of the General Fund is expected to increase with cost of living projections set by the City. There was a significant increase in one-time and ongoing funding in FY 18-19 from previous years.
• CDBG: Estimated to decrease over the years but have stayed relatively flat historically. These funds are passed through from the Portland Housing Bureau.
• Other Prosper Portland resources: Funds are meant to support programs during recessions and when there is insufficient funding from the City General Fund. FY 17-18 and FY 18-19 funding for the Network increased from previous years' resources. This trend, however, is not likely to continue.

Expenses: More than 75% of funds go directly to organizations who provide the above services to small businesses and entrepreneurs. These expenses, while not fixed, are critical and necessary to the Inclusive Business Resource Network. Approximately 3% of the funds are used for more discretionary purposes.

Staffing: Three people staff this program at Prosper Portland, with assistance from other staff. These three people have expertise in program and ecosystem design in support of small businesses and entrepreneurs. Staff provide direct assistance to organizations and individual clients, oversee use of funds, monitor outcomes, and connect clients to resources and business opportunities.

Assets and Liabilities:

Program Information

Bureau:	Prosper Portland	**Program Contact:**	Morgan Masterman
Website:	https://prosperportland.us/portfolio-items/inclusive-business-resource-network/	**Contact Phone**	503-823-6839

Neighborhood Prosperity Network

Program Description & Goals

The Neighborhood Prosperity Network is a Prosper Portland program designed to support social equity-based community economic development at the neighborhood level. The Network is a citywide initiative that fosters economic opportunity and vitality throughout Portland neighborhoods, with a focus on low-income populations and communities of color. Through grants, training and support from Prosper Portland, each Network organization is responsible for planning and implementing projects to improve the local commercial district.
Districts have been successful in growing financial support and volunteers over the past six years. These additional funds and staff assistance have supported direct business assistance and increased district employment.
The NPN includes funding to support a complimentary neighborhood-based effort for Venture Portland, who invests in smart, strategic growth of Portland's unique neighborhood business districts.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of volunteer hours provided by NPI Districts	33,186	20,599	30,000	30,000	0
Net number of businesses (NPI Districts)	25	25	20	20	0
Private Funds Leveraged by NPI Districts	$1,048,433	$826,687	$500,000	$500,000	0
Number of technical assistance hours to business district associations by Venture Portland	1,400	3,188	2,900	2,700	0
Private Funds Leveraged by Venture Portland	$300,000	$211,118	$650,000	$1,000,000	0
Number of projects funded by Venture Portland	26	27	35	35	0

Explanation of Services

With an emphasis on localized bottom up economic development Prosper Portland partners with seven community-based organizations located in North, Northeast and East Portland, to support economic opportunity, small business growth, and build community capacity in these neighborhoods. These organizations or districts include Cully Blvd Alliance, Division-Midway Alliance, Historic Parkrose, Jade District, Our 42nd Avenue District, Rosewood Initiative and St. Johns Center for Opportunity. Each NPN district has a board that is made up of community members. They also hold community events regularly.

NPN districts focus on the unique needs of their community with the goal of growing businesses and increasing employment opportunities. Grants from Prosper Portland enable the organizations to hire staff, make physical improvements, encourage community led development projects and increase the visibility of the district. Prosper Portland staff also provides technical assistance to the districts. Depending on district priorities, business technical assistance has been made available to districts from the Inclusive Business Resource Network and workforce navigators are available to assist in employment in the districts.

NPN outcome data is currently being revamped. However, trends over the past several years have shown increases in volunteers and private funds leveraged.

With a complimentary focus on spurring neighborhood small business connectedness and growth, Venture Portland provides technical assistance to 37 plus neighborhood business districts throughout Portland. Venture Portland's board meets quarterly, and it also supports 300 volunteer board members citywide. In FY 17-18 Venture Portland helped business districts work towards achieving 151 benchmarks of success, increase district staffing, increase district membership by 7% and generate $1.3 million in private business district investment.

Through grant funds, trainings, and technical assistance Venture Portland serves Portland's diverse and dynamic business districts, which are comprised of many of the city's businesses and nearly half of its jobs – playing a vital role in Portland's economic prosperity.

Equity Impacts

The Neighborhood Prosperity Network is a key program to deliver on Prosper Portland's Strategic Plan and ensure that historically underrepresented communities benefit from the investment that is occurring in the neighborhoods. These districts are in neighborhoods with the lowest average household incomes and higher than average diversity compared to Portland as a whole.

Venture Portland's Catalytic Investment Initiative provides high touch assistance to address historic and structural disparities and issues with affordability and displacement in 8 targeted business districts in East and North Portland (East: 82nd Ave, Foster, Gateway, Lents, Midway; North: Kenton, St. Johns, Williams). These districts, which collectively contain more than 6,000 businesses, have higher percentages of immigrants, people of color and people living below Portland's median household income.

Changes to Program

The Network's services in FY 19-20 are anticipated to be funded at 98% of the current FY 18-19 budget ($2,584,314), which is made up of General Fund, Tax Increment Financing (TIF) and other Prosper Portland resources. The program will no longer support Alberta Main Street, who's funding has decreased over the past two years.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	563,575	1,764,910	1,945,387	1,691,543
Sum:	**563,575**	**1,764,910**	**1,945,387**	**1,691,543**

Resources: • General Fund: Prosper Portland's portion of the General Fund is projected to increase with cost of living projections set by the City. The Network received $25,500 in one-time funding for Alberta Main Street in FY 18-19 that will not continue into FY 19-20.
• TIF: Each of the seven districts are in Urban Renewal Areas and receive tax increment financing annually and six of the districts (St. Johns is excluded) receive shared revenue from the City and Multnomah County. This is projected to increase in FY19-20.
• Other Prosper Portland resources: Funds are meant to support programs during recessions and when there is insufficient funding from the City General Fund. FY 18-19 funding for the Network increased from the previous year to provide one-time staff assistance to the districts.

Expenses: More than 84% of NPN funds go directly to the seven districts and are thus critical to maintain current level of services. About 4% of funds are discretionary.
82% of Venture Portland's funds are used to directly serve business districts and 18% are awarded to business districts as grants.

Staffing: 2 people staff the NPN program at Prosper Portland, with some assistance from other staff. Staff provide direct assistance to the districts, oversight for use of funds, monitor outcomes, and much more.
9 Venture Portland employees provide direct and indirect assistance to business districts.

Assets and Liabilities:

Program Information

Bureau:	Prosper Portland	**Program Contact:**	Dana DeKlyen
Website:	https://prosperportland.us/portfolio-items/neighborhood-prosperity-initiative/	**Contact Phone**	503-823-3312

Adult & Youth Workforce Development

Program Description & Goals

Prosper Portland, in collaboration with Worksystems, Inc. (WSI), funds youth and adult workforce development programs for low-income Portlanders, helping them to better connect and compete in the regional economy. WSI administers the workforce development programs through a network of service providers that serve over 2000 individuals annually, with up to three years of individualized job training and preparation and with an emphasis on high paying industry employment.
Program measures have shown a consistent level of assistance over the years, with slight increases in the percentage of participants of color and varying numbers from year to year in total participants. The percent of youth placed in employment or training was low in FY 17-18 due to the implementation of a new program and onboarding new providers.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of youth participants in workforce development	491	470	500	522	0
Percentage of youth participants POC in workforce development	77%	75%	70%	70%	0
Number of adult participants in workforce development	1,231	906	825	781	0
Percentage of adult participants people of color in workforce development	61%	56%	50%	65%	0
Percent of Adult Participants in Workforce Development who Advanced in Employment as Demonstrated by Gain in Earnings, Wage or Benefits	0	N/A	60%	60%	0

Explanation of Services

Adult Workforce Development: The Economic Opportunity Program has five adult workforce development providers to deliver supportive and individually tailored workforce development services. The program targets low-income Portland residents, age 18 and older, who face multiple barriers to employment. Eligible participants have an immediate goal of becoming employed, and engage in coaching, skill development and training to achieve career pathway employment. In addition to this system of providers, WSI makes resources, support and training available to EOP participants through Worksource Portland Metro (WSPM). Service length is individually tailored with a typical participant in service for approximately three years. Services include: individual career plan development; individualized vocational case management; career exploration; work readiness training; work experience placement and support; job search assistance and placement; retention and advancement supports after job placement. Additional services provided through WSPM include: contextualized, cohort-based adult education; job readiness courses; sector-based bridge training; short-term vocational training leading to employer-recognized certificates; occupational skills training leading to employer-recognized certificates; pre-apprenticeship programs and other targeted sector-based occupational training; internships; on-the-job training; and individualized job placement for certain industries and participants.

Youth Workforce Development: The NextGen Program has five youth workforce development providers serving culturally and geographically diverse populations within Portland. The program primarily targets youths age 16-24 who are disconnected from traditional high school or lacking the basic skills and credentials to enter college or career pathway employment. Each workforce development provider delivers supportive and individually tailored workforce development case management to youth for up to three years. Providers help youth identify and achieve their career goals and develop the life skills necessary to stay on course. The goal is for all participants to secure a career pathway job or progress along a path to complete post-secondary education. Services include: individual career plan development; career exploration; work and college readiness training; work experience placement and support; post-secondary placement, navigation and support; job search assistance and placement; and retention and advancement support after job or post-secondary placement.

Community Based Workforce Navigator: The Community Workforce Navigator Program (“CWNP”) began in 2015 to increase access to appropriate workforce development services for high barrier job seekers. The target population is under and unemployed residents, low-income residents, people of color and/or those who speak English as a second language. The CWNP is a neighborhood-based initiative focused in priority service areas throughout the City of Portland. The program currently has 3.5 staff who are employed by workforce development providers. Workforce navigators provide tailored workforce support, services include: individual needs assessment, resume review, interview skills, job search and placement support, and referrals to other workforce services or trainings. This program is closely coordinated with Neighborhood Prosperity Network (NPN) staff and community leaders.

Equity Impacts

The adult and youth workforce programs target those who have been disproportionately underserved. Over half of those who participate in the adult workforce programs are people of color, decreasing slightly from 61% in FY 16-17 to 56% in FY 17-18. Approximately 77% of youths who participated in workforce programs in FY 16-17 were people of color, which decreased to 75% in FY 17-18. The Community Workforce Navigator Program served 364 participants in FY 17-18, and 81% were people of color.

Of these participants about 54% of adults advanced in employment, while only 18% of youths were placed in employment or post-secondary training in FY 17-18. Youth development is expected to increase significantly in FY 18-19 with new program guidelines in place.

Changes to Program

Workforce services in FY 19-20 are anticipated to be funded at approximately 94% of the current FY 18-19 budget ($3,526,909), which includes General Fund, Community Development Block Grants (CDBG) and other Prosper Portland resources. Staffing levels will remain consistent.
WSI redesigned the youth workforce program, now known as NextGen. The program was updated to align with the Workforce Innovation and Opportunity Act (WIOA), which leverages a substantial amount of resources for the program. Program changes include improved alignment with Worksource centers across the Portland Metro Area, and cohort trainings in four high growth target sectors – healthcare, construction, technology and manufacturing.
The CWNP continues to grow and serve the most vulnerable populations throughout the City of Portland. The program was launched in the Cully/42nd Ave neighborhoods and has since expanded to include Jade/Division Midway, Rosewood and St Johns. Due to program success, staff will continue to explore expanding the program to serve all Neighborhood Prosperity Network neighborhoods.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	929,183	1,289,995	1,328,695	1,354,007
Sum:	**929,183**	**1,289,995**	**1,328,695**	**1,354,007**

Resources:
- General Fund: Prosper Portland's portion of the General Fund is projected to increase with cost of living projections set by the City.
- CDBG: Estimated to decrease over the years but have stayed relatively flat historically. These funds are passed through from the Portland Housing Bureau.
- Other Prosper Portland resources: Funds are meant to support programs during recessions and when there is insufficient funding from the City General Fund. FY 19-20 funding is projected to decrease by about 50%, due mostly to the fact that Enterprise Zone resources have been reallocated to other strategic plan priorities.

Expenses: 93% of funds get passed through to WSI who administers the workforce program and funds other organizations who have varying specialties within workforce.

Staffing: 1 staff person at Prosper Portland oversees the Workforce program, with help from support staff. She monitors use of funds, contract obligations, outcomes and other issues that arise.

Assets and Liabilities:

Program Information

Bureau: Prosper Portland

Website: https://prosperportland.us/portfolio-items/workforce-development-program/

Program Contact: Amy Fleck-Rosete

Contact Phone 503-823-9036

Traded Sector Economic Development

Program Description & Goals

As the city's economic development agency, Prosper Portland wants to ensure inclusive growth by supporting the competitive industries that provide high-quality job opportunities and working to fill those jobs with people of color and low-income residents.
Employment trends within target clusters over the past five years reflect the positive impact of customized business development and industry initiatives, combined with efforts to promote international business opportunities. The cluster development activities focus on three related and complementary sets of activities:
• Business development to alleviate barriers to growth and support quality job growth through business and industry expansion
• Business recruitment in partnership with Greater Portland Inc
• Global trade and investment

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of Traded Sector business retention, expansion visits		368	350	350	0
Number of Traded Sector direct assistance, referral activities	853	332	400	400	0
Number of Traded Sector business relocations (within Portland)	17	9	10	10	0
Number of Portland Traded Sector firms receiving export assistance	52	45	40	40	0
Number of Companies Introduced to Capital Partners	0		40	40	0
Jobs Resulting from Traded Sector Business Relocations and Expansions within Portland	0	1,743	1,000	1,000	0

Explanation of Services

Business Development: In FY 2017-18, Prosper Portland business development staff completed 332 unique visits to traded sector businesses. Business development focuses on providing access to loans, grants and other financial resources to aid expansion, workforce development, market analysis, real estate and site development services, identification of supply-chain opportunities and access to international markets.

In FY 2018-19, staff will connect with at least 400 unique local businesses to understand their competitive landscape and support the retention and expansion of quality jobs. To facilitate the growth of local businesses and encourage continued investment, Prosper Portland will seek to enroll 8 new companies into the Portland's Enterprise Zone program. These organizations will enter into public benefit agreements, which ensure that public resources invested in the growth of these businesses also result in broad-based benefits to marginalized communities throughout the city.

Prosper Portland's retention and expansion work is anchored in the city's four target clusters: Athletic and Outdoor Gear and Apparel, Green Cities Products and Services, Technology and Media, and Metals and Machinery Manufacturing. Each cluster is guided by an industry action plan outlining target initiatives/programs, which are currently being evaluated against the agency's social and racial equity mission. A core focus across all Prosper Portland business development activity is assistance to businesses creating accessible middle-wage jobs for under-represented populations or for those located in priority neighborhoods.

Business Recruitment in Partnership with Greater Portland Inc.: Greater Portland Inc (GPI) is a regional public-private economic development partnership that is focused on helping companies relocate to the Portland-Vancouver metro area. Prosper Portland invests in GPI to: 1) coordinate regional recruitments among greater Portland's local economic development organizations; and 2) lead regional marketing and branding to promote greater Portland as one of the nation's most competitive and vibrant metropolitan economies.

In FY 2019-20 Prosper Portland, in partnership with GPI, will strive to secure 10 business expansions or business relocations to the city and proactively develop 15 priority leads across target industries.

Global Trade and Investment: In FY 2019-20 Prosper Portland will continue its focus on supporting Greater Portland Global (GPG), the region's trade and investment strategy, in partnership with GPI, Business Oregon and other local export assistance providers. Prosper Portland will continue to prioritize export assistance to local companies by organizing business trips to priority markets in Canada, Mexico, Japan and Germany. General Fund resources that are dedicated to export promotion are also critical to continue relationships with strategic trade consultants who provide Portland-based firms with a suite of customized trade services.

Prosper Portland will continue to emphasize Foreign Direct Investment (FDI) as outlined in the GPG. FDI represents a major opportunity for the region to attract foreign capital to capitalize existing businesses, gap-finance redevelopment projects, and recruit companies to facilitate broader job creation. A particular focus area for the coming year will be to leverage Portland's vibrant entrepreneurial economy to position the city for high-value added FDI projects which are typically attracted only to top startup markets. The FY 2019-20 goals are to help 40 local firms access and utilize trade and investment services.

Equity Impacts

Over the past couple of years Traded Sector has altered its outcomes to more align with the agency's strategic plan. While this is still a work in progress, there have been significant gains in the popularity of the Public Benefit Agreements (PBAs) and TechTown pledge.

PBAs include efforts to engage diverse communities in traded sector work, buy goods and services from diverse companies and provide equity training opportunities for all PBA companies. 8 PBAs were signed in FY 17-18 and this is expected to expand in years to come.

The TechTown Pledge is a collective effort with the tech industry to increase workforce diversity and workplace inclusion. Prosper Portland convenes all parties monthly, staffs the Steering Committee and CEO Roundtable, and works with industry partners on service delivery including AllyShift Training and an annual survey of employees of member companies. TechTown has grown to cover 3,058 employees, a 60% increase from 1,908 employees in 2016.

Changes to Program

Traded Sector cluster services in FY 19-20 are anticipated to be funded at 91% of the current FY 18-19 budget ($1,869,602), which includes General Fund and other Prosper Portland resources. Traded Sector Business Development will maintain consistent staffing levels.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	1,373,106	1,650,155
Sum:	**0**	**0**	**1,373,106**	**1,650,155**

Resources: • General Fund: Prosper Portland's portion of the General Fund is projected to increase with cost of living projections set by the City. The Traded Sector budget included two one-time add packages in FY 18-19 totaling $250,740.
• Tax Increment Financing (TIF): Staff works to promote relocations and expansions in URAs as well as programs that are funded by TIF. While TIF has been lightly used in previous years for economic development, this is expected to grow in FY 19-20.
• Other Prosper Portland resources: Funds are meant to support programs during recessions and when there is insufficient funding from the City General Fund. Prior year funding for Traded Sector has remained relatively low, with an increase in funding in FY 18-19. FY 19-20 is projected to decrease by about 25%.

Expenses: About half of these expenses pay for staff, who provide direct services to companies and support peer meetings and trainings. The remaining funds sponsor events, promote trade and develop online platforms.

Staffing: There are 6 staff who lead these programs at Prosper Portland with assistance from other Prosper Portland employees. Staff provide oversight for use of funds, monitor outcomes and provide direct assistance to organizations.

Assets and Liabilities:

Program Information

Bureau: Prosper Portland

Website: https://prosperportland.us/portfolio-items/cluster-initiatives-industry-partnerships/

Program Contact: Troels Adrian

Contact Phone 503-823-3210

Administration and Support

Program Description & Goals

This program provides strategic support and direction for bureau staff, executive level assistance to the director, support to the senior policy team and program area staff, and administration of general bureau business operations.
The Administration and Support program supports the Citywide goal of effective and efficient management and governance of City resources, including personnel management, budget, and non-financial resources.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Administration and Support Program is a necessity to ensure the director and staff receive assistance to perform their duties. Furthermore, it provides administration and operations services to all of the other programs in the Office of Equity and Human Rights (OEHR). The services include office management, personnel management, budget, procurement, and other non-financial resources. The Administration and Support program supports the Citywide goal of effective and efficient management and governance of City resources, including personnel management, budget, and non-financial resources. This program supports community engagement by collaborating with the City's Advisory Boards and Commissions, including the Public Involvement Advisory Committee and communities at large. OEHR collaborates with the Portland's Human Rights Commission (HRC), the Portland Commission on Disability (PCOD), and the Bureau Advisory Committee (BAC). OEHR also seeks advice and recommendations from HRC on trending general human rights issues and from BAC on budget and strategies.

Equity Impacts

While the bureau does not have direct control over service delivery or experience, we have consulted on the use and need for disaggregated impact analysis. We are currently developing tools and accountability measures to guide such data collection/analysis efforts. OEHR is working with the Open data team to integrate equity into this process enabling stronger equitable analysis.

The Administration program also provides resources and logistics support to ensure employees and communities have access to City services. This program handles operations for Accommodations Funds allocated to the OEHR by City Council.

Changes to Program

OEHR converted a .6 Administrative Specialist I position to .9 (72 hours/week) to meet the increased need of administrative support by other programs. This change helped to improve the support to the disability equity, racial, human rights, and technical assistance programs. Furthermore, the Director's Executive Assistant has been handling more operations tasks and supervising the .9 administrative Specialist position.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	29,270	50,554	72,526	46,983
Internal Materials and Services	17,026	133,002	67,157	29,551
Personnel	148,285	229,160	262,446	210,360
Sum:	**194,581**	**412,716**	**402,129**	**286,894**
FTE	1.95	2.14	2.15	1.55

Resources: The Administration and Support is overhead funded by General Fund.

Expenses: The primary expenses of the program are personnel salary and benefits.

Staffing: There are currently 1.55 FTE associated with the Administration and Support Program. The Executive Assistant handles operations. The Administrative Specialist 1 provides logistics and administrative support to the Equity Training Program, the ADA Title II Program, the Civil Rights Title VI Program, and the Human Rights Commission. The Director provides oversight and makes budget and financial decisions.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Equity & Human Rights **Program Contact:** Judith Mowry

Website: www.portlandoregon.gov/oehr **Contact Phone** 503-823-4431

Diverse Empowered Employees of Portland (DEEP)

Program Description & Goals

The Diverse and Empowered Employees of Portland (DEEP) is an employee-driven committee of City employees for City employees that work to enhance the City work experience through networking, resource and professional development and support. The goal of DEEP is to support the City of Portland in creating a supportive and inclusive work environment. DEEP has established mentoring and networking opportunities for City employees, assists with diversity and cultural events, provides opportunities for training and education, peer support, and recruitment and retention strategies, as well as professional development. OEHR provides equity and budget guidance, as well as financial management for the committee. In future years, DEEP will track the number of DEEP-sponsored and coordinated events and the number of participants as performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

DEEP and the Affinity Groups are comprised of City employees of various races, backgrounds, age, sexual orientation, genders, length of time employed at the City, religions, abilities, etc. These groups participate in community activities and events and engage with many community stakeholders and organizations as part of their annual work plans or as part of their group's goals and missions. An equity lens is always used when engaging the community with all events and activities. This includes accessible spaces, engaging/renting space/hiring caterers from historically underserved neighborhood businesses/organizations, and at no cost to the public for more inclusivity.

DEEP oversees nine, soon to be ten, different Affinity Groups. These include DEEP's Affinity Groups include: 1) City African American Network, 2) Filipino American City Employees, 3) Latinx PDX, 4) LGBTQ & Friends, 5) Women's Empowerment, 6) PDXCityMamas, 7) Hapa, Asian, and Pacific Islanders (HAP), 8) Slavic Empowerment Team, 9) Veterans Empowerment Team, and a future American Indian/Alaska Native group. The Affinity Groups serve as a networking resource, professional development, peer support, and assist the City of Portland as an Employer of Choice. Other activities include Affinity Groups organizing events, trainings, speakers' panels, specific cultural events, during the year, as well as specific designated cultural months (i.e., Black History Month, Women's History Month, etc.); sometimes collaborating among the different groups to educate and celebrate the diverse workforce. Most events are open to the public, which creates a connection to the City of Portland as a community partner and a desirable employer. DEEP and the Affinity Group Leaders work together to provide support to employees, as well as providing recommended resources such as the Employee Assistance Program (EAP), training opportunities that supervisors may not deem job related, but are morale and/or professional development related. DEEP and the leaders meet quarterly with a representative from HR to answer specific questions and advocate for needs potentially related to their affinity and work/life balance. DEEP organizes/hires specific speakers to educate employees and the public on various topics related to equity, race, gender, LGBTQ, etc. These events are very well attended and praised for the educational value.

Equity Impacts

DEEP's programs benefit City employees and the community. More specifically than just communities of color and persons with disabilities. DEEP benefits employees and communities of color, veterans and families of veterans, working parents, women, LGBTQ, and immigrants and refugees. DEEP enhances what OEHR does by adding the extra peer support and the multiple Affinity Groups.

DEEP's Affinity Groups include: 1) City African American Network, 2) Filipino American City Employees, 3) Latinx PDX, 4) LGBTQ & Friends, 5) Women's Empowerment, 6) PDXCityMamas, 7) Hapa, Asian, and Pacific Islanders (HAP), 8) Slavic Empowerment Team, 9) Veterans Empowerment Team and hopefully the future American Indian/Alaska Native group.

Changes to Program

DEEP continues to be dedicated to City employees with support from OEHR, City Council, Bureau leaders, and the community. The political climate has increased the need for historically underrepresented communities and employees to need to connect with each other and seek support. The demand for support gatherings, speakers, and connecting have increased also due to the separation of bureaus and offices. The DEEP Executive Committee has gained a few new members over the last year, as well as lost a few due to promotional opportunities and/or career changes. The leadership has increased significantly among the Affinity Groups and a resurgence of activities related to new leadership following the Leadership Development Program in FY 2017-2018. Unfortunately, there is not enough funding or any staff time available for this kind of program that was successfully piloted.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	12,245	12,258	10,500	15,000
Internal Materials and Services	2,200	780	1,564	3,743
Personnel	15,591	15,447	14,450	28,217
Sum:	**30,036**	**28,485**	**26,514**	**46,960**
FTE	0.08	0.1	0.1	0.2

Resources: DEEP is funded out with General Fund resources.

Expenses: The primary of the program are personnel salary and benefits. Other expenses of the program are for events/meetings, cultural celebrations, Affinity Groups, speakers, printing, training/workshops/conferences, and miscellaneous expenses.

Staffing: The Office of Equity and Human Rights has assigned staff to serve as liaisons to DEEP. The total staff allocation from OEHR is 0.2 FTE, including financial transactions, communications, and meeting times.

Assets and Liabilities: Key assets operated by the program include a video camera, tripod, projector and microphone. These are over five years old.

Program Information

Bureau:	Office of Equity & Human Rights	**Program Contact:**	Debbie Caselton
Website:	www.portlandoregon.gov/deep	**Contact Phone**	503-823-2831

Equity Training and Education

Program Description & Goals

The Equity Training and Education program designs and delivers training to City staff on equity concepts and implementation methodologies, centering on race and disability. Participants cultivate equity mindsets by learning to recognize institutional barriers to just distribution of resources, and develop strategies to remove barriers in policies, programs, and practices.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of City employees who received equity trainings annually	1,202	980	350	1,000	5,682
Percentage of City employees that have completed Equity 101 training	74%	91%	90%	95%	100%

Explanation of Services

The Citywide Equity Program is critical to ensure the Office of Equity and Human Rights (OEHR) can accomplish its mission. The mission of OEHR is to provide education and technical support to City staff and elected officials, leading to recognition and removal of systemic barriers to fair and just distribution of City resources, access and opportunity, starting with issues of race and disability

Training focuses on understanding the principles of equity, systemic racism, and applying equity lens to policies and practices. Additional training sessions focus on civil rights requirements, accessibility for people with disabilities, and handling complaints.

The results from the activities of the citywide equity training and education program include better knowledge of equity concepts and strategies, increased skills to implement equity plans, and improved outcomes for all Portlanders. All City staff and elected officials will have a better understanding of equity concepts and strategies. They will have improved their skills and abilities to implement their racial equity plans and the disability equity plans.

OEHR's approaches to engage with community include the collaboration with the City's Advisory Boards and Commissions and communities at large. OEHR will collaborate with the Portland's Human Rights Commission (HRC), Portland Commission on Disability (PCOD), and the Bureau Advisory Committee (BAC). OEHR will seek advice and recommendations from HRC on trending general human rights issues, from PCOD on specific disability issues, and from BAC on budget and strategies. OEHR will organize equity training with a few community-based organizations that work with the City of Portland or receive grants from the City for community projects.

Equity Impacts

A robust equity training and education program strategy will benefit communities of color and people with disabilities by giving city employees the tools they need to use an equity lens while making decisions that impact those in marginalized communities, giving them a more prominent presence in City government. Credible and consistent equity training and education to City leaders and staff plays a vital role in OEHR's mission and goals, leading to a more equitable City culture.

Changes to Program

The vacant position of the Equity Training and Education Coordinator position was filled in January 2019. The Equity Communications Coordinator has combined this role for about a year. The hiring will increase training capacity for the office.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,626	336	0	0
Internal Materials and Services	39,093	13,125	26,980	31,814
Personnel	268,670	192,389	272,097	208,586
Sum:	**309,389**	**205,851**	**299,077**	**240,400**
FTE	1.38	2.2	2.23	1.7

Resources: The program is funded by General Fund discretionary.

Expenses: Personnel salary and benefits are the primary expenses of the program.

Staffing: The program is staffed by 1.7 FTE.

Assets and Liabilities: A projector, a laptop and speakers are assigned to this program.

Program Information

Bureau: Office of Equity & Human Rights

Website: www.portlandoregon.gov/oehr

Program Contact: Yolanda Sanchez

Contact Phone 503-823-5582

Technical Support and Consulting

Program Description & Goals

OEHR provides consulting, technical assistance, and equity tools to assist bureaus with meeting both the City's racial equity and disability goals. This program provides high level policy and program assistance working closely with equity managers, senior leadership and elected officials.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of requests by City bureaus or elected officials for equity consultation or technical assistance	40	75	60	200	200
Percentage of City workforce that are employees of color	25%	28%	35%	30%	30%
Percentage of City management that are employees of color	18%	21%	25%	26%	28%

Explanation of Services

OEHR is charged with addressing institutional barriers to equitable access and benefits of city government for communities of color and people living with disabilities.

In support of the OEHR mission, The Technical Support and Consulting Program provides comprehensive services to bureaus consulting on implementation tools and best practices to support all bureaus. In addition, applying a racial and disability equity lens, Results Based Accountability practices, communication and conflict resolution skills advances bureaus toward achieving their goals to assure equitable city government practices. Tools used to accomplish these goals include the 5-year racial equity plans and the Budget Equity Tool. The Technical Support and Consulting Program provides support ranging from policy guidance, facilitation support and technical assistance to numerous Citywide strategic initiatives, including but not limited to the Community Opportunities and Enhancements Program (COEP), the Portland Committee on Community Engaged Policing (PCCEP), the Smart Cities Initiative and the City's privacy and information protection principles. This program also supports the liaison to GARE, the national professional organization and supports the liaison to external partners such as Metro, Port of Portland, Multnomah County and national jurisdictions.

Portland City Council has committed with binding city policy to racial equity goals. The City is also required by Federal Law through Civil Rights Title VI and ADA Title II to provide equitable services to all Portlanders.

The goals and direction of the work is built on the robust community engagement for the Portland Plan. OEHR both advises bureaus on best practices for community engagement as well as meeting regularly with impacted communities on specific programs.

Equity Impacts

A robust technical support and consulting program strategy will benefit communities of color and people with disabilities by giving city employees the tools and assistance they need to use an equity lens while making decisions that impact those in marginalized communities, giving them a more prominent presence in City government. Credible and consistent equity support to City leaders and staff plays a vital role in OEHR's mission and goals, leading to a more equitable City culture.

Changes to Program

Large scale political changes and economic pressures have intensified the burdens of daily living on communities of color and people living with disabilities in Portland. This has resulted in an increase in both demand and urgency for OEHR TA and Consulting services. The level of need outpaces the available FTE requiring staff prioritizing and not always being able to meet the level of need.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,300	0	24,790	24,790
Internal Materials and Services	34,829	14,146	27,959	46,786
Personnel	280,900	196,257	193,883	330,607
Sum:	**317,029**	**210,403**	**246,632**	**402,183**
FTE	1.43	1.93	1.93	2.5

Resources: These positions are funded by the General Fund.

Expenses: Personnel salary and benefits are the primary expenses of the program.

Staffing: The program is staffed by 2.5 FTE.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Equity & Human Rights

Website: www.portlandoregon.gov/oehr

Program Contact: Judith Mowry

Contact Phone 503-823-4431

Civil Rights Title VI and Equity

Program Description & Goals

Title VI of the Civil Rights Act of 1964 states that no person shall be excluded from participation in, denied the benefits of, or be subjected to discrimination in any City program, service, or activity on the grounds of race, color, or national origin. This program identifies and develops Citywide policy and procedures for Civil Rights Title VI compliance. The program sets the internal city policy and directive for city-wide process, implementation, tracking, reporting and evaluation of Civil Rights Title VI compliance as well as providing comprehensive legal consultation around Civil Rights Title VI and equity to bureaus and elected offices. It also focuses on moving equity forward by providing technical assistance and tools to bureaus and City staff on equity best practices.

The goals of the Civil Rights Title IV Program are to create and provide an ongoing, consistent, and accountable structure and support to move the City toward Civil Rights Title VI compliance and equity; specifically, around interventions within the decision-making and operational process that shape and determine our public impacts, services, and deliverables. The intent and overall goals being that we can assure and demonstrate that for all, the City: provides inclusive, accessible, meaningful participation and engagement; fosters, provides and promote equitable benefits of government; ensures and is accountable to equitable impacts, treatment, and nondiscrimination in City decision making and its public programs, services, activities.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of bureau consultations regarding Title II / Title VI	115	156	90	150	150
Percentage of bureaus that have translated essential documents into the safe harbor languages	100%	65%	60%	100%	100%
Number of bureau consultations regarding the Language Access Program	60	40	75	50	50

Explanation of Services

In Portland and Multnomah County, communities of color continue to experience high levels of disparities in all indicators of quality of life. These current inequities are sustained by historical legacies and systems that repeat patterns of exclusion. Communities of color and low-income populations have historically been underserved by programs and investments and underrepresented in decision-making. As public policy has played a pivotal role in creating inequitable outcomes for communities of color, it is critical that government enacts policies that address the resulting disparities. The City of Portland is charged with effectively meeting the needs of and providing service to the community. Since 1964, the City has been obligated by federal law to address disparities – disparate treatment or impact - in our governance. Without a strong city-wide program to direct, monitor, and coordinate Civil Rights Title VI compliance the city not only fails to meet the basic customer service needs and access to the community, it puts itself at risk for further financial loss.

This program is best suited to meet the need of the City's federal obligations of Civil Rights Title VI because it employs subject matter expert on both Civil Rights and racial equity, which is a very specialized area of expertise. The program also coordinates compliance and equity efforts across the 26 bureaus, which is imperative in a commission form of government so that the community's interaction with the city is standardized in the most inclusive and customer-friendly way. The results from the activities of the Civil Rights Title VI Program include better knowledge of equity concepts and strategies, increased skills to implement equity plans, standardization of tools and procedures to facilitate and inform decision making and service improvement, and improved access and outcomes for all Portlanders. The program collaborates with the City's Advisory Boards and Commissions, including the Public Involvement Advisory Committee and communities at large, as well as the bureau's own Human Rights Commission (HRC), the Portland Commission on Disability (PCOD), and the Bureau Advisory Committee (BAC).

Equity Impacts

We are currently developing tools and accountability measures to guide such data collection/ analysis efforts. OEHR is working with the Open data team to integrate equity into this process enabling stronger equitable analysis. The Civil Rights Title VI program will collect compliance data (implementation activity and results) to monitor City progress toward equity targets.

The program currently collects data regarding the translation of vital documents demonstrating greater language access for limited English proficient communities. The program currently tracks data around Civil Rights Title VI complaints. The Civil Rights program will collect will collect quantitative and qualitative data from the bureaus about Civil Rights compliance efforts, including disaggregated data of existing or proposed public actions.

This program is working to establish the policy directives, implementation plans, and monitoring strategies for accommodations within both ADA Title II and Civil Rights Title VI compliance. The work of this program directly impacts the City meeting those requirements. Regarding interaction with the public, the Civil Rights Title VI program, has an SOP for requests, tracks request and accommodation efforts, disseminates information to the public about their rights, ensure accessible formats where possible, and has translated some of the vital documents into the safe harbor languages to create accessible communication pathways. OEHR will also work with the City Budget Office to collect data about bureau's outreach and accommodation expenses and monitor the impacts of the use of the funds on increasing access to City services for marginalized communities (communities of color, people with disabilities, elderly, etc.).

Changes to Program

A recent audit “Americans with Disabilities Act: Coordination gaps complicate City response (Report #476),” of the City's compliance efforts outlined deficiency in the Civil Rights program due to the serious lack of funding and staff. The audit shows a serious inability to support other bureaus with the training and technical support they require, while working on the implementation of a City-wide policy that supports compliance and supporting and maintaining data collection. Over the last two years OEHR has worked to mitigate these deficiencies by expanding the program into two categories: Civil Rights Title VI and ADA Title II, each with dedicated FTE. The transition of this program has been recent, and staff is still working through how to achieve the goals of the program with the limited resources and complex tasks/needs associated with City-wide compliance. Some recent innovations have come through exploring technology options that could make training and tracking more user friendly and less reliant of staff time.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	3,305
Internal Materials and Services	0	0	0	24,329
Personnel	0	0	0	170,551
Sum:	**0**	**0**	**0**	**198,185**
FTE	0	0	0	1.3

Resources: The Civil Rights Title VI and Equity Program is overhead funded by General Fund.

Expenses: The greatest expenses of the program are personnel costs for the 1.3 FTE associated with the Program.

Staffing: There are currently 1.3 FTE associated with this program. The Civil Rights Title VI and Equity Manager: responsible for setting the direction of the program as well as the structures, policies, and tools for overall City compliance with Civil Rights Title VI and equity. The HRC and Language Access Advisor: responsible for supporting the work of the program around the language access provision of national origin nondiscrimination and EO 13166, including language access planning, implementation organization, capacity building, technical assistance, data collection, and evaluation.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Equity & Human Rights

Website: www.portlandoregon.gov/oehr

Program Contact: Danielle Brooks

Contact Phone 503-823-2595

ADA Title II Disability Equity

Program Description & Goals

This program identifies and develops Citywide policy and procedures for Americans with Disabilities Act (ADA) Title II compliance. The program sets the internal city policy and directive for city-wide process, implementation, tracking, reporting and evaluation of ADA Title II compliance, as well as providing comprehensive legal consultation around ADA Title II to bureaus and elected offices. The program also focuses on moving disability equity forward by providing technical assistance, tools and training to bureaus and City staff on disability equity best practices. The goal of the ADA Title II and Disability Equity Program is to create and provide an ongoing structure and support to move the city toward ADA Title II compliance and disability equity. There is one key performance measure associated with ADA Title II compliance goals which is reporting on the Transition Plan, which audits physical barriers people with disabilities encounter while trying to access city program and services. There is another audit associated with ADA Title II compliance called The Self Evaluation, which is an audit compliance within the delivery of programs and services as well as the creation of policy. Both plans are required under federal law and the ADA Title II and Disability Equity Program acts as the administrative lead for city-wide direction, implementation and ongoing coordination. Because of the limits of FTE and resources the program has been limited to The Transition Plan. The disability equity goals are less tangible and focus on moving the city beyond compliance toward full inclusion. An example of this is found in the Model Employer policy that came out of the Office of Equity and Commission on Disability. This policy goes beyond ADA compliance by setting a plan for the city to become an inclusive work place for people across the various groups of disabilities. On a larger strategic level these goals should reflected in the Disability Equity Goals in The Comprehensive Plan.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of bureau consultations regarding Title II / Title VI	115	156	90	150	150
Percentage of ADA Title II Transition Plan barriers removed by City bureaus each year	47%	6%	90%	80%	100%

Explanation of Services

People with disabilities comprise of 20% of the Portland population. The City is obligated by federal law to provide equal access to programs and services to people with disabilities. The City has been under this obligation since 1991 and has been sued several times for failure to meet their ADA obligation. Without a strong city-wide program to direct, monitor, and coordinate ADA title II compliance the city not only fails to meet the basic customer service needs and access to the disability community, it puts itself at risk for further financial loss. This program is best suited to meet the need of the City's federal obligations of ADA Title II because it employs subject matter experts on both ADA and disability equity, which is a very specialized area of expertise. The results from the activities of the ADA Title II and disability equity Program are access and inclusion of people with disabilities in the programs and services provided by the City. The program collaborates with the City's Advisory Boards and Commissions, including the Public Involvement Advisory Committee and communities at large, as well as the bureau's own Human Rights Commission (HRC), the Portland Commission on Disability (PCOD), and the Bureau Advisory Committee (BAC).

Equity Impacts

The program currently collects data regarding the removal of physical barriers to people with disabilities through the transition plan. It is also currently creating a structure to collect data around accommodations requests that will inform the Self-Evaluation audit. Further, it tracks data around ADA Title II complaints. Lastly, the program collects data on bureau consultations.

The Program focuses internal City-wide compliance of The ADA Title II but recognizes that people of color also experience disability and integrates Civil Rights Title VI compliance in all of its work. The change to the organizational structure described below will enhance the disability equity initiatives and have positive impacts on people with disabilities. The increased support to bureaus on the implementation of the Transition Plan, the accountability measures, and the information dissemination will improve access for people with disabilities.

Changes to Program

A recent audit "Americans with Disabilities Act: Coordination gaps complicate City response (Report #476)," Outlined deficiency in the ADA Title II program due to the serious lack of funding and staff. Over the last two years OEHR has worked to mitigate these deficiencies by expanding the program from .5 FTE to 1.5FTE and by merging ADA Title II with disability equity. The transition of this program has been recent and staff is still working through how to achieve the goals of the program with the limited resources, Some recent innovations have come through exploring technology options that could make training and tracking more user friendly and less reliant of staff time.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	18,306
Internal Materials and Services	0	0	0	22,457
Personnel	0	0	0	142,082
Sum:	**0**	**0**	**0**	**182,845**
FTE	0	0	0	1.2

Resources: The program is overhead funded out of the General Fund.

Expenses: Primarily funding is for 1.2 FTE.

Staffing: There are currently 1.2 FTE associated with this program. The ADA Title II and Disability Equity Manager are responsible for setting the direction of the program as well as the structure for overall City compliance with ADA Title and disability equity. The Disability Specialist is responsible supporting the work of the program including data and tracking of the compliance plans.

The ADA Title II Manager position was created last year by a reclassification of the Disability Policy coordinator. The Disability specialist was hired in March of 2018, because of the strong demand by bureaus for ADA Title II technical assistance and legal consultation beyond the two major plans under its jurisdiction.

Assets and Liabilities:	N/A

Program Information

Bureau:	Office of Equity & Human Rights	**Program Contact:**	Nickole Cheron
Website:	www.portlandoregon.gov/oehr	**Contact Phone**	503-823-2907

Black Male Achievement Program

Program Description & Goals

The Black Male Achievement Program (BMA) initiative addresses disparities for Black men and boys in education, employment, criminal justice and community & family stability. The BMA initiative in Portland was initially established as a program of the National League of Cities and coordinated by the Mayor's Office, then established as a program area in OEHR in December 2014. The program leads a collective of community organizations to create access and opportunity to career pathways, self-determination, mental and physical health, and policy change.

The BMA Program will continue to act as a convener, facilitator, policy guide, and collective voice to obtain data, push for policy change, increase program scale, and exert influence to create awareness and change for the betterment of Black men and boys.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of participants who engaged in BMA sponsored/hosted activities or programs	650	750	500	1,500	1,500

Explanation of Services

Black Male Achievement Program (BMA) is needed because Black men and boys have some of the worst outcomes of any demographic across the domains of education, employment, justice system and family stability. The City of Portland as an entity maintains many institutions and systems that have direct control or influence those domains. As such the City works through the collective impact framework of BMA to convene, facilitate, guide policy, gather and track collective voice, and exertion of influence for the purpose of improving life outcomes for Black men and boys. BMA consists of primarily programmatic and policy efforts guided by a Steering Committee and carried out through four subcommittees for education, employment, justice system, and family stability.

The subcommittee for Justice System focuses on prevention, harm mitigation, fine/fee forgiveness and expungement. Many inroads to policy change and programs have been made through this focus including the removal of the Gang Designation Directive (a Portland Police Bureau program), Word is Bond Access, and Law Enforcement Assisted Diversion (LEAD). The subcommittee for Family Stability focuses on literacy, Black Father's Voice, and Trauma Informed Family. BMA's involvement and focus on this domain has led to the Black Men and Boys Healing Summit which was presented in October of 2018 and the Child Support Policy Paper, a policy brief that gathers the collective voice of Black fathers. The subcommittee for Education focuses on reading above grade level, zero classroom exclusion, and resources for community-based organizations. This committee has allocated approximately up to $4,000 per year to grant to community-based organizations with a focus on improving education outcomes for Black boys. Furthermore, the support of Senate Bill 553 led to the defined and limited circumstances under which a child 6th grade and younger could be excluded from the classroom for disciplinary purposes. This committee continues to be active in this policy area which is a key point in the school to prison pipeline.

The BMA Program also manages Summer Youth Experience, is a summer internship that aims to increase young Black men and boys, ages 16 – 24, successful completion of internships and build long term mentorship relationships that will increase their career success. Additionally, POIC Pre-Apprentice Program aims to build and maintain strong pipelines into the trades by supporting Portland Opportunities for Industrialization Center's creation of a pre-apprentice program.

Equity Impacts

Participation is the primary metric BMA is currently tracking for BMA outputs/outcomes. The BMA Steering Committee is working to identify broader metrics to track that will provide in depth analysis of improvements education, employment, justice system, and family stability for Black men and boys.

Changes to Program

Demand for the program services has only increased in the last year. Particularly the interest in doing more work to connect existing bodies who do similar work in the Black community. Such work requires a greater policy bandwidth and ability to meet with more stakeholders in a shorter period. The more community is aware of BMA and its goals and focuses the more the demand for BMA's work increases.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	12,858	17,586	30,000	37,500
Internal Materials and Services	21,280	10,773	21,506	19,650
Personnel	136,307	139,435	146,198	144,025
Sum:	**170,445**	**167,794**	**197,704**	**201,175**
FTE	1.1	1.19	1.2	1.05

Resources: Black Male Achievement is funded by General Fund.

Expenses: The primary expense for BMA is personnel. The remaining expenses are $8,000 for Summer Youth Experience, $4,000 for Education Subcommittee Community Based Org. Grants, $6,000 Travel for Committee members and coordinator, $500 for meetings and $1,000 for planning.

Staffing: 1.05 FTE for Program Coordination – City of Portland Office of Equity and Human Rights

Assets and Liabilities: N/A

Program Information

Bureau: Office of Equity & Human Rights

Website: www.portlandoregon.gov/oehr

Program Contact: Judith Mowry

Contact Phone 503-823-4431

Equity Communications

Program Description & Goals

The Equity Communications component of The Office of Equity and Human Rights promotes the equity work of the office and City to the community and internally, within City government; acts as Public Information Officer (bureau spokesperson); supports bureaus and elected officials with communications strategy development; processes public records and media requests; organizes public participation events; recruits Bureau Advisory Committee members and organizes their meetings; and produces informational resources and reports, videos, and other materials about OEHR.

Equity Communications will fulfill media and public records requests, create OEHR reports to Council, create multi-media material for OEHR's work, coordinate community events, and engage community with public events and social media.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

In the 2018 Office of Equity and Human Rights Strategic Planning Stakeholder Engagement Report, stakeholders stated a need for improved community connection and stronger coordination between the office and bureaus. Participants also stated a need for the office to better communicate and implement its priorities.

A dedicated Equity Communications Coordinator allows the office and the City to gather equity-centered input from Portlanders and strategically share a credible, consistent stream of equity messaging and updates to City staff and community. Effective outreach and public participation measures will result in a greater understanding of equity among external and internal audiences and help inform and support City-wide equity policies.

A successful equity program in the City can be measured by how communities of color and people with disabilities experience improvement in workforce diversity, services, and contracting opportunities. Gathering input from marginalized communities and sharing information with external and internal audiences will help the City institutionalize the concept of equity.

For its 2018 Strategic Planning Stakeholder Engagement Report, an independent consultant hired by The Office of Equity and Human Rights, performed extensive interviews and focus groups of internal and external stakeholders which involved various communities of color, immigrants, Native Americans, people with disabilities, youth leaders, and the LGBTQ community. Their responses inform the context, activities, and desired results noted above.

Equity Impacts

A robust equity communications and public participation strategy will benefit communities of color and people with disabilities by giving those and other marginalized communities a more prominent voice in City government. Credible and consistent equity communications to City leaders and staff play a vital role in the office’s equity training and education efforts, leading to a more equitable City culture.

Changes to Program

In 2018, due to a vacant position, the Equity Communications Coordinator took on additional duties as Training Coordinator. The early-2019 hiring of a full-time Training Coordinator will increase capacity for the Communications Coordinator to focus more on communications.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	70	0	1,500	1,500
Internal Materials and Services	12,492	6,603	0	12,164
Personnel	87,143	37,587	88,800	87,546
Sum:	**99,705**	**44,190**	**90,300**	**101,210**
FTE	0.7	0.7	0.7	0.65

Resources: The program is funded by General Fund discretionary.

Expenses: The primary expenses of the program are personnel salary and benefits, audio/visual equipment and software, and printing.

Staffing: The program is staffed by .65 FTE.

Assets and Liabilities: Key assets operated by the program include a still camera and video camera. The equipment is over five years old and is showing some signs of wear and tear.

Program Information

Bureau: Office of Equity & Human Rights

Website: www.portlandoregon.gov/oehr

Program Contact: Jeff Selby

Contact Phone 503-823-2173

Portland Commission on Disability

Program Description & Goals

The mission of Portland Commission on Disability (PCOD) is to guide the City in ensuring that it is a more universally accessible city. The commission seeks accessibility in the built environment, employment, livability, and health and outreach.
The Portland Commission on Disability will measure the number of requests for advice, consultation, technical assistance or input received from bureaus and elected officials.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of requests to PCOD for advice, consultation, or technical assistance by City bureaus or elected officials	13	13	20	10	10

Explanation of Services

People with disabilities comprise roughly 20% of Portland's population. Since 1991, federal law has obligated the City to provide equal access to programs, services, and activities to people with disabilities. The City has been successfully sued several times for not meeting its legal obligation to people with disabilities. In 2008, Council created the Portland Commission on Disability (PCOD). The idea behind PCOD was to give the community a voice in the design and review of bureau projects and to assist in the development of Citywide policy designed to foster compliance with the law.
For several years, the structure of PCOD has led to different levels of tension among stakeholders and diminishing results. Attempting to establish a new path forward for PCOD, the Office of Equity and Human Rights (Office of Equity) contracted out development of a new strategic plan. Key findings included that 1) PCOD is not aligned with its charter and mission, 2) Office of Equity support on disability has been insufficient, 3) PCOD members need more support and to be held accountable, and 4) City Commissioners and staff state they are unfamiliar with PCOD's work.
The bureau is working with the Commissioner-in-Charge to develop a new plan for PCoD in response to these findings to better align its work with the bureau's mandate to oversee the City's efforts to comply with Title II of the Americans With Disabilities Act, while maintaining and expanding a mechanism of design and review for bureaus.
The consultant report also contained information about internal issues impacting PCOD's ability to accomplish its objectives: 1) Members are not aware of the work other members are doing or the work PCOD did previously, 2) Several members of PCOD focus on barriers associated with their specific disability only when cross-disability education and advocacy is needed, and 3) PCOD members have demonstrated a collective lack of information about the priorities and initiatives of the Mayor, City Commissioners, and key bureaus.

Equity Impacts

The program currently tracks all accommodations for the Portland Commission on Disability in compliance with ADA Title II.

Changes to Program

A new position has been added to this program in FY 2019-20 to help implement the program changes discussed above.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	13,649	19,122	38,500	28,500
Internal Materials and Services	15,010	8,452	16,618	15,907
Personnel	87,302	82,725	97,368	205,830
Sum:	**115,961**	**110,300**	**152,486**	**250,237**
FTE	0.94	0.83	0.84	1.85

Resources: This program is supported by General Fund resources.

Expenses: The program supports 1.85 FTE and budget for ADA accommodation and Commission needs.

Staffing: The staffing level for PCOD has been at .85 FTE for years; a new position was added in FY 2019-20.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Equity & Human Rights
Website: www.portlandoregon.gov/oehr
Program Contact: Jonathan Simeone
Contact Phone 503-823-1231

Human Rights Commission

Program Description & Goals

The Human Rights Commission (HRC) works to eliminate discrimination and bigotry to strengthen inter-group relationships and to foster greater understanding, inclusion and justice for those who live, work, study, worship, travel, and play in the City of Portland. In doing so, the Commission is guided by the principles embodied in the United Nations' Universal Declaration of Human Rights.

The Human Rights Commission is an all-volunteer advisory body comprised of Human Rights Commissioners appointed by City Council. The Human Rights Commission advises City Council and City bureaus on applying a human rights lens to policy and advises on promoting and protecting human rights in the City of Portland.

The Human Rights Commission will measure the number of requests for policy analysis using a human rights lens, advice, consultation, technical assistance or input received from elected officials, community members, community-based organizations, and bureaus.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of HRC advisements, consultations, or technical assistance provided to City bureaus and elected officials offices	7	18	6	14	14

Explanation of Services

The Human Rights Commission lends its expertise to City policy processes by using a human rights lens analysis to existing policy, and policy development in city government. Applying a human rights lens to policy promotes and educates city policy makers in considering those community members who are most vulnerable and most potentially impacted by city policy. The HRC human rights lens policy analysis is conducted through collaboration with City leadership and City council policy advisors. Community stakeholders also play a significant role in informing the Commission’s analysis and recommendations. The HRC commissioners additionally conduct their own research to inform their recommendations, with additional research provided by staff. The HRC uses its purview to advise city leadership on human rights issues that impact Portland’s community members. The HRC engages with internal and external stakeholders to promote, educate, and advocate for human rights in the City of Portland. Through proactive engagement with stakeholders, the HRC can connect community voice to city government. The outcomes of said engagement with internal and external stakeholders are important to increase awareness of human rights issues affecting Portlanders, affect policy change through the application of a human rights lens and continue to serve as a city advisory body the public can rely on to voice their human rights concerns.

The HRC commissioners all have deep community connections to Portland’s diverse & vulnerable communities and through those networks connect community to the Commission’s work and to city government. The HRC prioritizes listening to the public through the public comment period of their meetings and communities of color and people with disabilities access this opportunity to bring their experiences with human rights violations to the Commission. The HRC is intentional in its community engagement and has instituted holding their meetings in community-based spaces once a quarter to take their meetings to the public and to be able to provide access to community members who experience barriers in accessing their meetings held downtown.

Equity Impacts

The Human Rights Commission centers its policy recommendations on achieving equitable outcomes for Portland's most vulnerable community members. In its engagement with city government the HRC holds leadership accountable to assessing the benefits & burdens policy outcomes may have on vulnerable populations. Improving access to city government for Portland's most vulnerable communities is an important outcome of the Commission's advisory role to City Council and city bureaus. Through the HRC's policy analysis, the potential impacts of the originating policy are assessed, and recommendations are given based on increasing equitable outcomes for marginalized communities in Portland.

Changes to Program

Both OEHR staff and the HRC commissioners continue to be dedicated to increasing engagement with City council, city bureaus, and the community. As engagement increases, the HRC is afforded more opportunities to lend its expertise in promoting & raising awareness of human rights concerns and to give policy recommendations based on a human rights lens analysis. The OEHR staff role has increased to be a more advisory role with the commission. Staff proposes policy analysis opportunities, serves as the liaison between internal city leadership and the HRC commissioners in order to move policy recommendations and research forward, and facilitates and conducts all the communications with internal and external stakeholders.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	5,389	6,493	14,000	14,000
Internal Materials and Services	17,295	8,872	17,205	18,714
Personnel	107,211	82,683	113,600	126,973
Sum:	**129,895**	**98,049**	**144,805**	**159,687**
FTE	0.93	1.02	1.04	1

Resources: The Human Rights Commission is overhead funded out of the General Fund.

Expenses: The primary expense for HRC is personnel. The remaining expenses are for the annual community engagement event (Human Rights Awards) $3.5K, food for all HRC full body meetings.

Staffing: The program currently has 1 FTE. As noted above the role of the OEHR staff who works with the HRC has changed greatly from past years. The OEHR HRC staff advises the commission on guiding its policy agenda, recommends policy analysis opportunities, serves as liaison for internal and external stakeholders, manages all communications, and conducts research and policy analysis on human rights issues.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Equity & Human Rights **Program Contact:** Tatiana Elejalde

Website: www.portlandoregon.gov/oehr **Contact Phone** 503-823-4432

Investing in Children

Program Description & Goals

The purpose of the Portland Children's Levy is to prevent childhood hunger, to help children arrive at school ready to learn, to provide safe and constructive after-school alternatives for students, to prevent child abuse and neglect, and to help children in foster care succeed.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of children served	11,500	12,000	12,000	12,000	12,000
Number of administrative cost audits	1	1	1	1	1
Number of grant contracts managed	69	74	70	70	70

Explanation of Services

The Portland Children's Levy contracts with nonprofit providers and other governments to provide services to children throughout Portland. Funding comes from the proceeds of a five-year property tax levy, most recently approved by voters in 2018, and is estimated to provide $22 million in FY 2019-20. The Children's Investment Fund is projected to have a fund balance of $9.6 million on July 1, 2019. Funding categories as provided in the ballot measure language are: Early Childhood; Child Abuse Prevention and Intervention; After School; Mentoring; Foster Care; and Hunger Relief.

Programs must demonstrate that they are cost effective and have a proven record of success to be eligible for consideration for funding. The Children's Levy Allocation Committee awards grants through a competitive process. The allocation committee consists of a City of Portland commissioner, a Multnomah County commissioner, a member of the business community appointed by the Mayor, and two members appointed by City Council and the County Commission respectively. Under provisions of the Levy, no more than 5% of the fund may be spent for expenses associated with administering the fund. The fund is audited annually to ensure compliance.

In FY 2017-18, the allocation committee chose 74 grants to fund for two years, beginning July 1, 2017. The total of these grants is $36.4 million. Grant budgets for FY 2018-19 total $19 million. In the spring of 2019, the Children's Levy Allocation Committee will make decisions concerning the renewal of existing grants for an additional year beginning July 1, 2019. These funding recommendations will be submitted to City Council for review.

Equity Impacts

The Children's Levy requires all funded programs to report demographics on children served (gender, age, race/ethnicity identification(s), primary language spoken in the home, zip code of residence or school attended or homeless status, household income and disability status). The Levy also disaggregates service and participation data to assure that programs serve disproportionately higher percentages of traditionally underserved populations (as compared to the percentage of the school population or other relevant comparison population such as population in foster care), and that these children and youth are retained in programming. This data is reported annually. Data from 2017-18 shows that 70% of the children served in PCL funded programs were of color, and that children of color were successfully retained in programs in which they enrolled. This data has been consistent for the past four fiscal years.

Changes to Program

Services and activities for the Children's Levy are substantially similar to those in prior years.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	16,305,191	23,450,000
Sum:	**0**	**0**	**16,305,191**	**23,450,000**

Resources: Funding comes from the proceeds of a five-year property tax levy, most recently approved by voters in 2018, and is estimated to provide $22 million in FY 2019-20. The Children's Investment Fund is projected to have a fund balance of $9.6 million on July 1, 2019

Expenses: The Children's Levy is budgeting $23,450,000 for program expenditures in FY 2019-20. The Children's Levy plans to spend up to $1,040,295 to administer the fund in FY 2019-20; this figure is 4.25% of budgeted expenditures for the fiscal year.

Staffing: The Children's Levy employs 7 individuals who work 6.15 FTE. The Levy is led by the Director and Assistant Director who also serve as Grant Managers. One additional Grant Manager works for the Levy. The Levy also employs a Communications and Outreach Coordinator; Communications and Outreach Director and a Financial Analyst. The Levy will be hiring a staff person to oversee the development of a small grants fund in FY 2019-20

Assets and Liabilities: The Children's Levy is projected to begin FY 2019-20 with a fund balance of $9.6 million. The Levy has no liabilities.

Program Information

Bureau: Portland Children's Levy
Website: www.portlandchildrenslevy.org
Program Contact: Lisa Pellegrino
Contact Phone 503.823.2939

OCT - Broadband & Digital Inclusion

Program Description & Goals

Internet access is a critical challenge of the 21st century and access to the information and services it provides are foundational for economic growth and opportunity, education, health, and quality of life.

Portland, in 2011, was one of the first US cities to adopt a cohesive, community-wide plan, the Portland Broadband Strategic Plan (PBSP), that recognized the social, economic and political importance of broadband in reaching our livability, prosperity, sustainability, and equity goals. The program works toward key goals that the community identified as important to overcoming barriers to an inclusive and digitally-connected community:

• Ensure access to affordable high-speed internet and devices;

• Provide culturally-specific training and support;

• Empower community partners through funding, coordination, and resource sharing;

• Create digital economy job opportunities for underrepresented populations; and

• Build a supportive public policy framework.

More recent survey data (2014-2017) has identified improvements in some aspects of internet access for residents (near saturation of access for those earning at least $50,000 annually and 100% geographic broadband availability) but digital inequities persist and reinforce lines of social disadvantage. For example, 2017 American Community Survey data shows at least 21% of people of color Multnomah County-wide do not have an internet subscription at home.

The PBSP and the DEAP (Digital Equity Action Plan) are embedded in the Portland Plan, the City's economic development strategy, the City's Climate Action Plan, Smart City PDX initiative, and the City's work on the upcoming 2020 Census.

The program also works with other City bureas and offices, local governments, community stakeholders, and national organizations to advocate at the State Legislature, Federal Communications Commission (FCC), and US Congress on broadband and digital equity public policy.

In reference to the blank performance table below, please note that given that the bureau is in a transitional phase, programs are not reporting performance measures in this budget. During 2019, however, the bureau's programs do intend to establish performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Communications technology is essential for employment, education, health service and transportation among other things essential to our lives and access to it is increasingly a matter of equity. In order to ensure that Portland residents have access to the opportunities afforded by internet access, the Broadband and Digital Equity program:

• Coordinates efforts across City bureaus and with broadband providers to develop strategies, policies, and funding to expand broadband and communications infrastructure and digital inclusion resources to meet both City and regional network capacity needs.

• Participates in statewide Oregon Broadband Council work to ensure Portland's interests are included and considered in policy discussions and in the annual State of Broadband report.

• Advocates for state and federal policies and programs that support digital equity and local broadband development, such as Net Neutrality rules, LifeLine and E-Rate programs' low-income subsidies for broadband service, and establishment of an Oregon broadband office.

• Advocates to protect local authority to negotiate public benefit agreements with commercial users of public assets and for municipalities to own broadband infrastructure and provide network services to itself and others.

Results and Community Engagement:

• The Digital Inclusion Network (DIN), which coordinates activities of the Digital Equity Action Plan (DEAP), grew from 35 to 45 organizations and 100% of the DEAP strategic actions are "on track".

• The first annual local Digital Inclusion Summit, with participation from over 120 digital inclusion practitioners representing 69 unique organizations, inspired new community partnerships and promoted awareness about new and persistent digital inclusion barriers.

• City Council adopted the Smart City PDX Priorities Framework, which program staff played an active role in helping to develop.

• Open Signal, a Portland community media center, increased its digital media literacy classes, workforce technology skills training, and other community technology access services to residents.

• The City gained membership in the national ConnectHomeUSA Intitiative, which provides access to new public-private partnership and learning opportunities.

Equity Impacts

National and local data shows that digital disparities are greatest for people living in poverty, people of color, English language learners, people with disabilities, and seniors. The Year 1-3 DEAP was developed through engagement of these populations to better understand their barriers to adoption. The Broadband and Digital Equity program focuses on leading public policy related to broadband deployment and empowering and supporting community-based partnerships that tackle barriers to internet adoption.

Changes to Program

In September 2018, City Council directed the reestablishment of the Office for Community Technology as a standalone bureau, following eight years as a sub-division in the Revenue Division of the Office of Management and Finance. As of September 2018, it reports directly to the Mayor's Office.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	1,007,514	995,683
Internal Materials and Services	0	0	0	19,267
Personnel	0	0	95,814	216,821
Sum:	**0**	**0**	**1,103,328**	**1,231,771**
FTE	0	0	0	1.38

Resources: General Fund Discretionary

Expenses: The program's largest expense, $938,320, is the amount provided to Open Signal for digital literacy and technology services to the community. The remaining expense funds staff and related external and internal materials and services.

Staffing: The program has an equivalent of about 1.4 FTE. The director is a new position beginning in the 2018 Fall BMP to lead the newly reinstated standalone bureau.

Assets and Liabilities: N/A

Program Information

Bureau: Office for Community Technology

Website: https://www.portlandoregon.gov/oct/73859

Program Contact: J. Omelchuck & R. Gibbons

Contact Phone 503-823-4188

OCT - MHCRC

Program Description & Goals

For 25 years, the Mt. Hood Cable Regulatory Commission (MHCRC) has ensured that the communities in Multnomah County and the cities of Fairview, Gresham, Portland, Troutdale and Wood Village are fairly compensated for use of the public right of way by cable companies. In addition, MHCRC monitors and helps resolve cable subscribers' concerns and participates in the planning and implementation of the communities' use of cable communications technologies.

More specifically, MHCRC regulates cable television service, cable internet service and digital telephone service. MHCRC also works to protect consumers of the above services. Finally, MHCRC administers a Technology Community Grants program which assists local entities in using cable system technology for enhanced communications, including video, data and voice applications.

The MHCRC contracts with the City of Portland, through its Office for Community Technology (OCT), for administrative and staff services. Based on that contract, MHCRC operations resource and expenses are located within OCT's budget. The MHCRC retains a segregated fund for its dedicated community benefits expenses (such as grants).

In reference to the table below, please note that given that the OCT is in a transitional phase, the bureau's programs do not have performance measures to report for FY 2019-20. During 2019, however, bureau programs intend to establish performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The MHCRC program:

• Provides consumer protection for subscribers in cable television and cable internet service matters, including complaint resolution.

• Manages the Community Technology Grants program which awards competitive grants to fund digital literacy and multi-media services with non-profit community organizations, local governments and libraries.

• Directs the TechSmart Initiative for Student Success, a 10-year funding initiative focused on improving outcomes for all students in Multnomah County. The initiative plans to invest a total of about $19 million in partnership with local school districts for technology and teacher supports to transform teaching and learning for students.

• Facilitates the Institutional Network (I-Net) partnership between Comcast, the Portland Bureau of Technology Services (BTS) and public institutions. The I-Net provides reliable and affordable fiber connectivity and network services for about 300 public entity sites such as schools, libraries, fire and police stations, County courts and community colleges.

• Manages I-Net grants to BTS and I-Net users to fund site connections and I-Net related capital equipment and services.

• Enforces cable company compliance with franchise agreements.

• Leads cable services franchise negotiations, renewals and transfers of ownership.

• Conducts community technology needs and interests ascertainments to craft franchise public benefit obligations that meet demonstrated community needs.

• Manages a grant agreement with two community media organizations (Open Signal – serving Portland; and MetroEast Community Media, serving communities in East Multnomah County) for capital and technology costs related to community media and digital inclusion services.

• Advocates at the local, state and federal levels to protect local interests and control in cable and communications policy and right of way management.

• Provides fiduciary oversight and management of the MHCRC Fund (about $7 million annually), including fund tracking, trend modeling, revenue projections, annual fund audit, and accounting services.

Regarding community engagement, the MHCRC program led an extensive community engagement effort in 2010 to assess community technology needs and interests throughout Multnomah County. This effort included focus groups and interviews with culture-specific organizations and leaders in communities of color and people with disabilities. The program used this data to negotiate public benefits in cable services agreements that addressed barriers in access to technology for underserved communities and organizations. The program also uses district data on students in underserved populations when allocating TechSmart Initiative funding to school districts.

Equity Impacts

The program tracks data regarding geographic distribution, target beneficiaries and organization focus for the Community Technology Grants. As a result, over time, the program has increased outreach to organizations that provide services to traditionally underserved populations and populations geographically located in low-income areas. As a result, the program has seen an increase in the number of grants in these areas.

The TechSmart Initiative uses a "weighted" model to allocate funds among school districts. Half of the annual available funding is allocated on a per-student basis and half on students from underserved populations (ie. English language learners, students of color, free/reduced lunch, students with disabilities, etc.). In its annual evaluation, the Initiative also collects data about classroom practices and technology that are effective for these student populations' learning and shares these findings across all school districts. Through grant agreements with Open Signal and MetroEast Community Media, these organizations track demographic information for certain program offerings and they use this data to continually improve access to underserved populations in their communities.

Changes to Program

As traditional cable companies continue to move services to internet platforms and video delivery over the internet expands, franchise fee revenues and funding for community grants, network infrastructure and community media are diminishing. Current federal law limits local authority for these public benefits based on the company's revenues derived only from cable TV services. Cable franchise and public benefit revenues began to flatten several years ago but from FY2016-17 to FY2017-18, revenues in Portland decreased by 6.7%. Unless federal policy changes, the program anticipates significant restructuring or discontinuance of services and programs over the next three years.

In September 2018, City Council directed the reestablishment of the Office for Community Technology as a standalone bureau, following eight years as a sub-division in the Revenue Division of the Office of Management and Finance. As of September 2018, it reports directly to the Mayor's Office.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	383,214	418,616
Internal Materials and Services	0	0	121,723	110,377
Personnel	0	0	394,748	580,553
Sum:	**0**	**0**	**899,685**	**1,109,546**
FTE	0	0	0	4.04

Resources: Roughly half the program's budget is funded by contributions from each of the MHCRC-member jurisdictions, in accordance with the Intergovernmental Agreement that created the MHCRC. The other half is funded through other MHCRC resources (compliance funds and fund interest).

Expenses: Roughly half of the program expenses are personnel costs for staff to perform program work; one-fourth is for external services; and one-fourth is for internal services.

Staffing: The MHCRC resource to the OCT funds four FTE for the program. Staffing levels for the program have remained the same over the past five years.

Assets and Liabilities: N/A

Program Information

Bureau:	Office for Community Technology	**Program Contact:**	Julie S. Omelchuck
Website:	www.mhcrc.org	**Contact Phone**	503-823-4188

OCT - Utility License & Franchise

Program Description & Goals

The Franchise and Utility program negotiates and administers franchise agreements granting access to the public right of way. Staff utilize the City's authority to manage the long-term use of public rights-of-way and levy taxes and fees and ensure the city is fairly compensated for use of the right of way.

In FY18-19, there were approximately 250 total Franchise and Utility accounts, which generated about $82 million annually for the city's general fund. The program is the City's third largest source of general fund revenue. Staff are developing performance measures for FY 20-21 to align with general fund and licensing goals.

In reference to the table below, please note that given that the OCT is in a transitional phase, the bureau's programs do not have performance measures to report for FY 2019-20. During 2019, however, bureau programs intend to establish performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The public right of way is the city's largest asset and is held in trust by the city for its residents. The city grants utilities and other companies the authority to build infrastructure in the public right of way to provide essential services to Portland residents. Utilities that profit from the use of the public right of way should offer fair value in return to further the City's access and affordability goals. The program collects approximately $82 million annually for the general fund which goes to fund essential city services, such as police, fire, parks, transportation.

The Franchise and Utility Program does the following:

• Negotiates and administers franchise agreements granting access to the right of way, collects compensation negotiated from those agreements, and administers the agreements on behalf of the city.

• Administers the utility license code, which is a tax on utilities operating within the city of Portland, including telecommunications companies who don't install or maintain infrastructure. The program administers approximately 55 franchises and 200 utility license accounts.

• Also supporting the program is a full-time auditor position who audits franchise and utility license accounts. The position is part of the Revenue Division's audit section. Franchise and Utility Program, in collaboration with the permanent audit position in Revenue Division, is developing an audit appeals process to streamline expected disputes over audit findings.

• Works closely with other city bureaus, jurisdictions and industry in developing policies for a connected, smart city, including tracking state and federal legislation on affecting the city's authority to manage the right of way. Under the City Charter, franchise agreements are subject to public notice and approved by City Council before becoming effective. The public has an opportunity to engage at these stages.

Equity Impacts

The program supports essential City services through the administration and collection of franchise and utility license fees for the City's general fund and is the third largest source of general fund revenue.

Changes to Program

Staff are developing substantial regulatory and process requirements improvements for wireless equipment in the right-of-way and participating in interbureau efforts to develop and coordinate public policies for right-of-way access for wireless service and internet of things devices. These efforts are vital because of unprecedented and continuing federal and state preemption efforts and markedly increased requests to use the right of way to support these applications, particularly from telecommunications companies.

In September 2018, City Council directed the reestablishment of the Office for Community Technology as a standalone bureau, following eight years as a sub-division in the Revenue Division of the Office of Management and Finance. As of September 2018, it reports directly to the Mayor's Office. Following the reorganization, the Franchise and Utility program divested the check and ACH processing and collections. Those functions remained with Revenue, while OCT retained the functions for account management, policy development, franchise administration and utility license administration. OCT managed the transition and trained Revenue staff to take over those roles. The auditor position was also transferred to the Revenue Division.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	49,521	225,289
Internal Materials and Services	0	0	86,976	412,798
Personnel	0	0	115,291	737,232
Sum:	**0**	**0**	**251,788**	**1,375,319**
FTE	0	0	0	4.58

Resources: General Fund discretionary

Expenses: About half of the program expenses are personnel costs for staff to perform program work, one-fourth is for external services, and one-fourth is for internal services. The table above shows negative personnel budget for 2019; this is due to issues associated the transitions to new City budget software and processes, as well as the re-establishment of OCT as a stand-alone bureau.

Staffing: There are approximately 4.6 FTE in this program and one limited term position. The director is a new position beginning in the 2018 Fall BMP to lead the newly reinstated standalone bureau.

Assets and Liabilities: N/A

Program Information

Bureau:	Office for Community Technology	**Program Contact:**	Jennifer Li
Website:	www.portlandoregon.gov/oct	**Contact Phone**	503-823-5359

Funds Management

Program Description & Goals

The Funds Management program enables the bureau to make long-term financial decisions through issuing and repaying debt, as well as retaining cash for future expenditures and unforeseen circumstances.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Ratio of ongoing General Transportation Revenue (GTR) resources to GTR Current Service Level Requirements	N/A	N/A	N/A	1.10	1.00
Debt Ratio	N/A	N/A	N/A	7%	7%
Transportation Reserve Fund Balance	N/A	N/A	N/A	6%	10%

Explanation of Services

The Funds Management program consists of two activities: Debt Activity and Financial Management. Debt Activity services debt for which the bureau, rather than the City as a whole, is responsible. Financial Management is primarily concerned with managing the bureau's cash flow, ensuring funds are set aside for future expenditures.

Equity Impacts

Proper management of bureau funds enables other programs to meet their equity goals.

Changes to Program

No significant changes to debt service are anticipated in the upcoming fiscal year. Changes to the bureau's contingency reflect expected carryover balances from bureau programs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	23,805	50,600	65,883	0
Internal Materials and Services	-15,551,755	-17,227,248	0	-27,652,133
Personnel	689,509	464,747	602,571	0
Fund Expense				
Contingency	0	0	139,108,832	78,553,224
Debt Service	57,888,540	29,124,541	29,194,571	20,777,233
Debt Service Reserves	0	0	1,673,047	1,673,047
Fund Transfers - Expense	10,093,855	10,269,707	10,352,768	9,866,731
Ending Fund Balance	168,473,734	221,075,757	0	0
Sum:	**221,617,688**	**243,758,103**	**180,997,672**	**83,218,102**
FTE	6	4.5	0	0

Resources: The program manages a variety of bureau funding sources. Funds are separated within contingency according to their source and intended use. Debt Activity is funded through General Transportation Revenue (GTR), which is allocated according to scheduled debt service payments.

Expenses: The majority of the program's funds are placed in contingency and drawn upon to meet expected future expenditures or to address unforeseen circumstances. Funds for Debt Activity are dedicated to debt service payments.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: Bureau staff are not directly employed by this program.

Assets and Liabilities: This program is not directly responsible for any bureau assets.

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation/

Program Contact: Jeramy Patton

Contact Phone 503.823.6188

Support Services

Program Description & Goals

The Support Services program provides bureau-wide services such as administrative, employee, finance, accounting, performance process improvement, data analysis, procurement, contracting, safety and training and business technology. This program also provides leadership and overall policy, communications, asset management and strategic direction for the Bureau of Transportation. This program also leads the collaborative work between the city, state, federal and other local agencies on policy and planning. Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Average time to hire	N/A	N/A	N/A	100	0
Number of employee Safety Incidents	N/A	N/A	N/A	240	0
Number of employee Safety Site Visits	N/A	N/A	N/A	200	0
Percentage of total contract dollars awarded to DMWESB firms	N/A	N/A	N/A	30%	0

Explanation of Services

• The Support Services program is primarily supported by the Office of the Director, the Maintenance Admin & Support Group and the Business Services Group. These programs primary purpose is to provide leadership and strategic direction as well as the supporting services for transportation staff.
• Activities within this program include Asset Management, Equity Group, Communications, Financial Services, Business Technology Services, Contracts Management, Employee Services, Administrative Services, Strategy, Innovation and Performance (OSIP), Safety and Training and Emergency Preparedness.
• The work of this program ensures that PBOT leverages the full potential of IT services, provides bureau-wide leadership, project coordination and support services for PBOT managers, certifies bills are paid on-time and revenue is collected, establishes strategic priorities for the Bureau, provides communication services and bureau-wide safety and training.
• The Portland Bureau of Transportation (PBOT) has an extensive community engagement and outreach program through which community outreach events, stakeholder meetings, the bureau budget advisory committee, direct mailings, media releases, email and website, the bureau endeavors to reach all of our customers to help determine the bureaus goals and priorities.

Equity Impacts

The equity goals of this program are to provide equitable city services to all residents. PBOT recognizes racial equity as a strategic guiding value and principle. PBOT uses data-driven and collaborative approaches, and racial equity tools to plan and evaluate the progress in our policies, programs and projects towards achieving equitable outcomes in communities of color and people with disabilities.

Changes to Program

Changes due to external factors: With the passage of House Bill 2017 by state lawmakers, the voter approved Fixing Our Streets Tax, and Heavy Vehicle Use Tax PBOT has seen in influx of new work. To support this work the Support Services Group has had to increase its capabilities both by increasing staffing levels and utilizing technological upgrades such as E-Builder software to streamline work processes and data.
Changes to resources: No significant reallocations of bureau resources will be occurring to this program compared to prior years.
Changes to organizational structure: No significant organizational structure changes to this program in the past year.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	8,296	0	50,000	50,000
External Materials and Services	13,219,782	8,636,424	5,789,530	3,541,642
Internal Materials and Services	5,783,263	13,822,231	-7,170,648	18,763,041
Personnel	18,404,693	17,756,554	14,079,245	16,011,116
Fund Expense				
Contingency	0	0	-2,263,954	0
Fund Transfers - Expense	0	0	0	3,398,416
Sum:	**37,416,034**	**40,215,209**	**10,484,173**	**41,764,215**
FTE	100.2	99.88	122.8	119.3

Resources: The primary resources that support this program budget are GTR/indirect funding. Some minor amounts of interagency revenue funding also settle to this program.

Expenses: The primary expenses of this program are personnel costs and interagency materials and services. Staffing levels for this program increase and decrease along with the overall trend of the bureau and the work requirements. Interagency costs make up the majority of the expenses in this program and include the bulk of the bureau's technology, facilities, printing and distribution, risk and insurance costs along with legal services, revenue collection and permit services work to mention a few.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: To support the workload and requirements of the bureau, staffing levels within this program have increased in the past few years. Eleven additional support staff have been added to support our asset management, IT, OSIP, contracts, HR, communications and Director's group.

Assets and Liabilities: The E-builder software is operated by the Asset Management group and is only in its second year of operation at PBOT. The maintenance fee is budgeted annually. Maximo is the bureau's work order software system which is currently in the process of being upgraded. Funding for this project is in the current budget and project completion is expected by FY 2020-21.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Jeramy Patton
Website:	https://www.portlandoregon.gov/transportation/	**Contact Phone**	503.823.6188

Asset Management

Program Description & Goals

The Asset Management program provides a strategic approach to allocating resources for the preservation, operation, maintenance and management of transportation infrastructure. Through the systematic use of management processes, engineering and economic analysis and transportation network evaluation, the program has identified service-and risk-oriented projects informed by City and bureau goals. Managing the true value of PBOT's assets and investments will allow the bureau to deliver on its commitments to asset preservation, safety, equity, and mobility. Program success is determined through the amount by which the bureau's maintenance backlog is reduced, performance is increased, system gaps and deficiencies are resolved, efficiencies leveraged, and service level expectations are met or exceeded.

The overarching Asset Management goals are:

- To ensure that all assets are maintained in a state of good repair and that said assets meet intended service levels

- To ensure that PBOT's asset investments reduce barriers and improve equity for all users - To ensure that the condition of all transportation assets support safety system-wide

- To ensure that PBOT provides adequate, long-term funding for transportation system maintenance and enhancement

To achieve these top-level goals, PBOT will:

• Establish equitable asset reinvestment priorities to extend the life of the City's transportation assets, efficiently utilize limited resources to properly maintain assets, and deliver desired service levels for asset performance;

• Develop asset strategies to minimize the bureau's infrastructure maintenance backlog and be responsive to infrastructure needs over the long term;

• Collaborate with communities, particularly historically under-represented groups, to identify desired service levels, asset reinvestment needs, and project outcomes. Lead public outreach and engagement around identifying these needs, and prioritize requested work in project scheduling and delivery;

• Implement a formal, transparent, equitable, and accessible process for advancing capital improvements that support safety system-wide;

• Formalize decision-making for asset acquisition, operation, maintenance, renewal and replacement including heightened urgency and accountability for work in communities of color and immigrant and refugee communities; collect and report data on asset reinvestment and capital improvement plan progress broken out by geographic area to evaluate targeted progress in communities of color;

• Set strategy for efficient delivery of capital projects to manage the long-term life of transportation infrastructure.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Below you will find the results of PBOT's asset management efforts broken down by the key measures of this program area's success. In general, over the past several years, PBOT has been able to maintain or slow the declining condition of the City's priority transportation assets and is making steady progress in stemming the rate of increase in PBOT's overall maintenance backlog.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of PBOT-owned bridges in non-distressed condition	85%	84%	85%	85%	0
Percentage of "busy" (collector/arterial) streets in fair or better condition	50%	48%	56%	50%	0
Percentage of local streets in fair or better condition	36%	31%	35%	35%	0
Average network Pavement Condition Index (PCI)	N/A	N/A	N/A	55%	0
Cost of deferred maintenance	N/A	N/A	N/A	0	0

Explanation of Services

Asset Management Projects Highlights: FY 2019-20 – FY 2023-24 Capital Improvement Plan has 36 Asset Management projects totaling $119.0 million. The projects leverage funding from Fixing Our Streets, Build Portland, Transportation System Development Charges, General Fund, and federal grant dollars.
The program will work to support bridge replacement, the delivery of paving improvements including base repair, the mitigation of landslide threats, and the reconstruction of signals and streetlighting citywide. Through the investments in system preservation and dependability, the bureau will also be able to prioritize around capacity enhancements and safety.

Equity Impacts

The Asset Management program supports PBOT's equity goals related to racial and disability equity by responding to and prioritizing service requests made by historically underrepresented groups and persons with mobility disabilities, such as through MO Dispatch (823-SAFE) and the Ramps by Request program. Through these efforts and others, PBOT's Asset Management program responds to the bureau's Racial Equity Plan Actions 1.5 (Design and use capital improvement racial equity impact assessment tool for infrastructure projects), 1.6 (Prioritize projects according to racial equity matrix), 4.3 (Using data to address infrastructure deficiencies in communities of color), 5.4 (Inform communities of color how work within the bureau is prioritized), and 5.10 (Develop process to rank constituent concerns through dispatch).
It is the intention of the Strategic Asset Management Plan (SAMP), the bureau's 10-year asset management strategy (in development), to include a more robust and comprehensive process by which to engage historically under-represented groups (communities of color and low-income areas) as well as those with mobility disabilities. Changes to public outreach, methods and forms of engagement with these groups will be introduced following the SAMP's adoption at the end of fiscal year 2019.

Changes to Program

External Factors: The CAO and CFO's energy around elevating Asset Management-thinking at the City level and the interest in development of a citywide CIP list has brought attention to current asset data deficiencies at the Bureau level (these deficiencies exist across the City, not just within PBOT). The interest in increasing reporting requirements and comparing asset condition and needs across bureaus has highlighted a need to further develop PBOT's asset condition data. This work would significantly increase demands in this program area.
In addition, reporting requirements to the State (as a result of HB 2017) and to the FTA (as a result of MAP-21) also increases demands on this program area. Both state and federal reports are required bi-annually on the condition of the city's pavement and bridge system, for the former, and streetcar system, the latter.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	4,872,333	2,192,422	32,803,580	20,068,673
External Materials and Services	488,127	2,151,695	11,510,817	6,108,647
Internal Materials and Services	4,209,327	1,210,211	2,063,868	2,109,383
Personnel	1,229,322	1,258,547	6,059,617	2,825,219
Fund Expense				
Contingency	0	0	-150,000	0
Fund Transfers - Expense	950,000	0	0	0
Sum:	**11,749,109**	**6,812,875**	**52,287,882**	**31,111,922**
FTE	14	17	104.75	111.95

Resources: The capital projects are funded by one-time General Fund, HB 2017, Fixing Our Street, System Development Charges, and Build Portland allocations.

Expenses: The primary expenditures are personnel, consultants, and complementary resources required to plan, design and construct projects.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: Staff are budgeted in other programs and allocated to projects with allocation expense account.

Assets and Liabilities: Once projects are constructed, the City owns the assets which include, sidewalk, signs, crosswalk, signals, pedestrian islands, and other infrastructure.

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Millicent Williams

Contact Phone 503-823-4229

Managing for Growth

Program Description & Goals

This program utilizes its growing list of capital projects to consider the efficient and inclusive use of limited space throughout the city to ensure ongoing business development and employment opportunities while enhancing access to businesses by implementing improvements that improve and expand access. As the population continues to grow, housing demands will continue to increase resulting in the need for a more robust transportation system that is able to meet the needs of travelers using all modes. The planned capital projects will help to address the needs with intentionality.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

A key measure of PBOT's success in this area is "the percentage of trips made by people walking and bicycling, including transit." As residents have more, safer, reliable transportation options, our City should witness a continued shift to alternative transportation modes. As of 2017, the latest year of the American Community Survey (ACS), 25% of Portland residents are choosing alternative ways of getting to their destinations. With our investment in Managing for Growth focused projects, PBOT will look to increase this percentage and bring the City closer to its 2030 target of 70%. Other measures of this program's success are presented below.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of trips made by people walking and bicycling, including to transit	25%	25%	27%	28%	0
Percentage of residents who commute to work by car alone	N/A	N/A	N/A	0	0
Percentage of annual budgeted Capital Improvement Plan expended	N/A	N/A	N/A	90%	0

Explanation of Services

The FY 2019-20 – FY 2023-24 Capital Improvement Plan has 24 Safety projects totaling $227.0 million. The Portland area has historically been a center of trade and commerce in the Pacific Northwest and, because of its connections to the interstate highway network, marine and rail terminals, and an international airport, has grown into the fourth largest freight hub for domestic and international trade on the west coast; behind the Los Angeles, Seattle and San Francisco regions. Portland's economy is far more dependent on freight movement than most other US cities. The Portland region has the third highest percentage of total employment in the distribution and logistics sectors in the U.S., comprising 11% of the region's workforce. According to the Oregon Department of Employment, one out of nine jobs in the Portland area are in the transportation sectors.

As we consider how the built environment informs decision-making and affects behavior, planners and project managers will work together with community stakeholders to develop solutions that will serve multiple needs. The outcomes will be project that will simultaneously address concerns about congestion while designing facilities that maintain community character and identity - all while increasing utility.

Capital projects that embody the spirit of what is meant when we speak to the importance of economic development as well as health and livability are projects such as the federally funded East Portland Access to Transit project. This project combines pedestrian improvements on outer SE Division to assist with accessing transit with bikeway crossing improvements on the 130's Neighborhood Greenway. Project elements include sidewalk infill and crossing improvements on the route of the 130's Neighborhood Greenway. The overall goal of the project is to make accessing transit stops in East Portland safer and easier for both pedestrians and cyclists.

Activities such as the collection of fees paid by developers for Public Works permits helps to spur economic development in the city. The Public Works Permit project provides for the plan review and construction engineering on all new and remodeled residential, commercial, and industrial projects. All engineering and plans work is performed by private sector professional engineers.

Investing in the growth and health of a City's infrastructure is vital to its future. Failure to be intentional and inclusive in performing the necessary capital planning creates gaps and allows strategies to become watered down. Planning for the present and future health of any city requires focused attention to trends, policy shifts, political tides and the voices people that will ultimately be served.

The region will add 500,000 new residents by 2040. If we are to capably meet the rising needs, we must take seriously the challenges before us. The FY 2019-20 – FY 2023-24 CIP will invest an approximate total of $199.0 million in projects dedicated to Economic Development and Health and Livability. That is the City's way of demonstrating its commitment to addressing the needs today and planning for a future Portland.

Each project manager works with a series of stakeholders to ensure that they are involved throughout the course of project implementation. Effective community engagement:

• Creates an environment of trust between the bureau and the stakeholder;
• Generates new ideas and solutions;
• Increases communication and creates openness in the community;
• Provides opportunities for residents to participate in the decision-making process;
• Connects people and resources by improving connections among individuals, community associations, businesses, households of faith, etc.;
• Improves organizational transparency and responsiveness;
• Helps manage the conversation; and
• Provides opportunities for cooperative, co-learning experiences and collection of critical community wisdom.

Equity Impacts

Equity is a core component of sustainability and should be a prominent element of managing future growth and development as it relates to transportation infrastructure planning. If community members do not feel included in the planning and implementation of any project that is being introduced, bureaus should not be surprised if their recommendations are not well-received. Through this program, the Portland Bureau of Transportation has an opportunity to:

• Ensure that the quality of transportation available positively affects people's economic and social opportunities;

• Better understand how transportation expenditures impact individuals, households and businesses;

• Learn how transportation planning decisions can affect development location and type and therefore accessibility, land values and local economic activity; and

• Evaluate how transportation facilities, activities and services impose various indirect and external costs, such as congestion delay and accident risk, pollution and undesirable land use impacts on communities.

Changes to Program

The FY 2019-20 – FY 2023-24 Capital Improvement Program demonstrates an emphasis on Managing for Growth based by: increasing mobility options; creating opportunities for greater reliance on mass transit (in partnership with local transit providers); focusing on smart growth; and promoting community relationships that will ensure sustainable development.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	7,242,852	10,123,043	53,056,540	67,197,134
External Materials and Services	14,244,934	8,426,666	10,619,475	3,880,829
Internal Materials and Services	5,586,461	3,972,341	5,675,129	3,545,403
Personnel	3,700,895	3,884,438	8,723,150	6,518,456
Fund Expense				
Fund Transfers - Expense	-300,000	0	0	0
Sum:	**30,475,142**	**26,406,489**	**78,074,294**	**81,141,822**
FTE	0.09	1.46	0.8	0

Resources: Resources funding capital projects in this program include Build Portland, one-time General Fund, System Development Charges, Fixing Our Street, HB 2017, and Recreational Cannabis Tax Fund revenues.

Expenses: The primary expenditures include personnel, consultants, and all project delivery components required to plan, design and construct projects.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: Staff are budgeted in other programs and allocated to projects with allocation expense account.

Assets and Liabilities:	Various infrastructure assets including traffic calming devices, signs, parking meters, parking garages, pavement markings, bikeways, guardrails, retaining walls, the Harbor Wall, stairways, and traffic signal computer controllers.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Millicent Williams
Website:	https://www.portlandoregon.gov/transportation	**Contact Phone**	503-823-4229

Safety & Vision Zero

Program Description & Goals

The primary goal of this program is to reduce transportation fatalities and serious injuries by supporting the implementation of comprehensive, system-wide, multimodal, data-driven, and proactive projects that demonstrate the integration of safety into decision-making and project design. Safety planning and project selection is a collaborative and integrated approach that brings together safety partners to leverage resources and information aimed at ensuring that shared safety goals are met. By utilizing a data-driven safety planning process, PBOT has been able to identify short-and long-term opportunities to address the safety performance of the local street network.

One of the ways that the bureau seeks to meet its goals is through the Vision Zero initiative. Vision Zero is the bold goal to eliminate traffic deaths and serious injuries on Portland streets. Vision Zero success depends on reaching beyond traditional transportation agency safety programs. It is a multi-agency, multi-partner initiative that requires cooperation, commitment, urgency and action across the community. Vision Zero addresses safety by reducing conflicts within and between transportation modes using a safe systems approach. The actions are data-driven and built on a racial equity framework.

Key Vision Zero performance trends are the number of people who die or are seriously injured on Portland streets each year, including by mode, age and location. City Council adopted the Vision Zero Action Plan in December 2016. The first year (2017), was a year of building a foundation – passing critical legislation and gaining significant funding; 2018 was a safer year with the number of traffic deaths trending in the right direction.

Additional measures of this program area's success were also defined over the past year through the rigorous exercise that PBOT performed to establish a new performance measure set for FY 2019-20. The new measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of traffic fatalities	44	46		0	0
Percentage of annual budgeted Capital Improvement Plan expended	N/A	N/A	N/A	90%	0
Total miles of bike facilities	N/A	N/A	N/A	401.80	0
Number of automated speed cameras on High Crash Network streets	N/A	N/A	N/A	10	0
Number of new and retrofitted pedestrian crossings on High Crash Network streets	N/A	N/A	N/A	50	0
Miles of streets where speed limits were reduced to improve safety	N/A	N/A	N/A	20	0
Number of traffic related pedestrian and bicyclist serious injuries	N/A	N/A	N/A	-	0
Number of traffic crashes that result in serious injuries	N/A	N/A	N/A	-	0
Percentage of the High Crash Network that meets PBOT's pedestrian spacing crossing guidelines	N/A	N/A	N/A	10%	0

Number of automated speed camera locations where more than 50% of vehicles are traveling at or below the posted speed	N/A	N/A	N/A	10	0
Number of traffic related pedestrian and bicyclist fatalities	N/A	N/A	N/A	0	0
Percentage of East Portland High Crash Network streets that meet 2 sided lighting guidelines	N/A	N/A	N/A	23%	0

Explanation of Services

The FY 2019-20 – FY 2023-24 Capital Improvement Plan has 71 Safety projects totaling $270.0 million. The projects will leverage funding from Fixing Our Streets, Build Portland, Transportation System Development Charges, General Fund, Recreational Cannabis Tax Fund revneues, and federal grant dollars. Safety projects include one or a combination of the following characteristics: crossing improvements, sidewalk infill, lighting infill, paving, signage and striping, neighborhood greenways, improved bike facilities, and ADA improvements.
Signature service lines within the Safety Program include Safe Routes to Schools, the Neighborhood Greenways Program, the Pedestrian Network Completion Program, and the Missing Links Program. Projects that do not fall under one of the aforementioned service lines address issues such as road reorganization, traffic calming, access management and streetscape implementation. All of the efforts combine to create a safer transportation system for the traveling public.

Equity Impacts

PBOT's Safety Program through the Vision Zero Action Plan places a strong emphasis on equity and supports Portland's Citywide Racial Equity Goals.
The Vision Zero Action Plan commits that actions will:
• Address disproportionate burden of traffic fatalities in Communities of Concern
• Prioritize filling gaps in infrastructure in Communities of Concern
• Will not result in racial profiling
• Will use equity data (demographics, risk factors, traffic enforcement data, infrastructure gaps) to prioritize needs in low-income communities and communities of color
• Measure and report on investment in low-income communities and communities of color

Changes to Program

Since City Council adopted the Vision Zero Action Plan in December 2016, the program has benefited from growing collaboration across bureaus and with other jurisdictions and agencies.
• Changes due to external factors. Vision Zero is shaping transportation infrastructure in more than 30 cities in the United States. With increasing visibility locally and nationally, Portlanders continue to request slower speeds, safer streets and more education and engagement around traffic safety.
• Changes to resources. Given the bureau's emphasis on ensuring that projects are designed and built to address safety, 22 additional projects have been added to the Safety Program. This increase
was due, in large part, to the influx of funding that came into the bureau that is focused on improving infrastructure.
• Changes to organizational structure. As a bureau priority, Vision Zero and safety have become more embedded in PBOT projects and programs. To that end, Vision Zero team members collaborate with colleagues throughout the bureau to ensure that projects and programs are contributing to safer, more multi-modal streets and/or engaging on traffic safety.
• The FY 2019-20 Adopted Budget includes $500,000 in one-time Recreational Cannabis Tax Fund resources for strategic lighting infill work along the High Crash Network. These funds will add street lights along the street and add pedestrian crossing lighting along a 0.7-mile stretch of SE Stark Street.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	5,752,119	4,089,177	51,509,300	64,973,240
External Materials and Services	-749,788	2,681,828	8,567,454	7,397,763
Internal Materials and Services	2,634,244	3,505,053	6,580,954	7,973,743
Personnel	2,646,156	3,703,267	15,195,551	12,823,673
Fund Expense				
Contingency	0	0	-503,456	0
Fund Transfers - Expense	375,000	0	0	0
Sum:	**10,657,731**	**13,979,324**	**81,349,803**	**93,168,419**
FTE	0.81	0.24	0	0

Resources: The Vision Zero program is funded by General Transportation Revenue. Capital Safety projects are funding by federal and state grants, System Development Charges, Fixing Our Street funds, HB 2017, and Recreational Cannabis Tax Fund revenues.

Expenses: The primary expenditure includes personnel, consultants, and project delivery elements required to plan, design and construct projects.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: Staff are budgeted in other programs and allocated to projects with allocation expense account.

Assets and Liabilities: Once the projects are constructed, the City owns the assets which include, sidewalk, signs, crosswalk, signals, pedestrian island and other infrastructure.

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Millicent Williams

Contact Phone 503-823-4229

Environmental Systems

Program Description & Goals

The Environmental Systems Program consists of activities for the systematic inspection, cleaning, and repair of the City's sanitary and stormwater collection and conveyance systems, including sewer and stormwater lines, street catch basins, sumps and manholes, trash racks, and drainage ditches and culverts. The program also provides emergency response to sewer systems problems. The program includes the PBOT recycling operation that processes materials from PBOT construction activities into usable products. The goal of the Environmental Systems Program is to protect water quality, public health, and the environment by maintaining and repairing the City's sewer and stormwater collection system in compliance with regulations and guidelines set forth by federal, state and local agencies. A further goal is to conserve, recycle and reuse natural resources through the Sunderland Recycling program.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Linear feet of sewer/storm lines tv'd and inspected	N/A	N/A	N/A	0	0
Linear feet of sewer/storm line repaired/lined	N/A	N/A	N/A	22,173	0

Explanation of Services

The Bureau of Environmental Systems (BES) owns and operates all public sanitary and stormwater collection, conveyance, and treatment systems in the City. Through an agreement with BES, Transportation Maintenance Operations inspects, cleans, repairs and maintains the 3,040 miles of storm and sanitary sewer lines in the City. It also investigates and responds to customer problems and maintains the surface stormwater conveyance system.

The goal of these activities is to protect water quality, public health, and the environment by maintaining and repairing the sewer and stormwater collection system. Inspecting is key to accurately determining the structural and operational condition of the collection system. Cleaning the system maintains asset condition and capacity, enhances the City's infrastructure investment, and controls odors. Repairing the system protects the City's investment, extends the asset's useful life, and reduces the potential for catastrophic failures.

The program also includes the PBOT Sunderland recycling operation which processes asphalt, old concrete, street debris, and leaves to produce usable products, including rock, gravel, compost, blended soil, sand, and clean fill dirt. These activities help the City meet sustainability goals, conserve natural resources, lower hauling and disposal costs, and provide materials for use on City projects.

Equity Impacts

The activities and services of this program are provided city-wide and benefit all areas and all communities, including communities of color and persons with disabilities. The program's maintenance and repair activities are provided based on asset condition, system needs and emergency response requirements citywide and are not restricted to geographic areas or demographic communities.

Changes to Program

There are no changes to the program's organizational structure, staffing or activities in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,551,668	1,432,724	2,970,737	2,984,187
Internal Materials and Services	10,447,327	10,773,017	11,202,145	11,975,297
Personnel	10,467,864	10,983,422	14,635,623	15,996,896
Sum:	**22,466,859**	**23,189,164**	**28,808,505**	**30,956,380**
FTE	132	134	146.2	146.75

Resources: The majority of the activities in this program involve the cleaning, repair and maintenance of the sewer and stormwater systems owned by the Bureau of Environmental Services (BES). BES pays PBOT for these services through an interagency agreement. General Transportation Revenue (GTR) funds the cleaning and repair of PBOT-owned street catch basins, as well as the program's indirect activities. For the past several years, the interagency with BES has been increased by inflation, which has proven to be more than sufficient to cover program costs. Therefore, the FY 2019-20 interagency budget will remain the same as in FY 2018-19 and will not be increased. The Sunderland recycling operation is funded primarily by GTR, with some revenues coming from fees charged to residents and companies for the disposal or purchase of materials. The fees are not considered to impact any community's ability to access recycling services. The funding from BES, the GTR support and recycling revenues for this program are expected to remain reliable and sustainable in coming years.

Expenses: The primary expenses of the program are personnel costs, which are fixed, predictable and essential to delivering program services. Other major expenses are fleet and equipment operating costs and sewer repair/ cleaning operating supplies, all of which are critical to providing services and meeting program goals.

Historical expense and FTE figures may show large discrepancies from due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program has a total of 146 staff members, the majority of which work on sewer and stormwater activities. Staff include supervisors and field crews that perform sewer and recycling activities. Over the past five years, this program has added six new sewer repair field positions to reduce the backlog of sewer repair work and to increase capacity during the swing shift by creating two more crews to respond to sewer back-ups and spills and to increase the footage of sewer lines inspected.

Assets and Liabilities: This program inspects, cleans and repairs the sewer and stormwater system assets that are owned by the Bureau of Environmental Services, including 3,040 miles of pipeline, 40,789 sewer access structures (manholes), 9,167 storm access structures, 8,625 stormwater sumps (underground injection control, or UIC), 683 miles of laterals, 506,880 linear feet of ditches, 75 miles of culverts, 54,700 stormwater inlets and catch basins, 328 trash racks and 148 manufactured stormwater facilities.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Scott Clement
Website:	www.portlandoregon.gov/transportation	**Contact Phone**	503-823-7052

Streets & Signs

Program Description & Goals

The goal of the Streets and Signs program is to preserve or upgrade the condition of Portland's improved streets through maintenance and cleaning activities, to maintain all traffic signs and markings, and to manage traffic to provide a safe and accessible transportation system for the public.

Managing Portland's streets and signs requires preserving and upgrading pavement through street maintenance and cleaning activities; maintaining and improving pavement markings to support safety, visibility, and the efficient movement of vehicles (motorized and non-motorized) on Portland streets across all modes; and maintaining, cleaning, and replacing signs to communicate regulation, information, direction, parking restrictions and guidance.

Adequate management of these assets keeps the City in compliance with federal and state requirements pertaining to visibility of regulatory guidance (markings and signs) and safety infrastructure. Further, cleanliness and visibility of parking signs is required for PBOT to enforce parking restrictions, manage the curb zone in parking districts, and collect revenue that accounts for a portion of PBOT's limited discretionary transportation funding.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Average network Pavement Condition Index (PCI)	N/A	N/A	N/A	55%	0
Number of crosswalks installed or maintained	N/A	N/A	N/A	3,100	0
Number of signs maintained or replaced	N/A	N/A	N/A	20,000	0
Number of potholes repaired	N/A	N/A	N/A	5,000	0
Total miles of curb cleaned during annual leaf removal program	N/A	N/A	N/A	1,059	0
Number of High Crash Corridors restriped annually	N/A	N/A	N/A	1	0

Explanation of Services

This program inspects, maintains and repairs the 4,852 miles of local and collector/arterial paved roads in the city, and annually grades and gravels some of the 50 miles of unpaved roads. It investigates and responds to pavement problems, including potholes, and provides emergency response to street and right-of-way hazards, which is vital to public safety. These activities are critical to providing citizens access to transit, employment, social, health and education services. Pavement preservation is essential to successful asset management, as it is much more expensive to repair or reconstruct pavement that is in very bad condition than it is to continue to maintain it in good condition. Pavement management activities in the program evaluate street conditions and assign pavement condition index numbers that are used to prioritize work and recommend optimal pavement treatment based on existing conditions.

The program also installs, maintains, repairs and tracks approximately 170,000 street-name, regulatory, warning, traffic-control, and parking signs, as well as installs and maintains the vast diversity and quantity of pavement markings, lines and legends, and provides traffic control for emergencies and city events. These assets are critical safety features to direct and regulate vehicles, pedestrians and bicyclists. Failure to maintain appropriate, clear and visible signage and striping can impact the ability of police or parking enforcement to enforce traffic and parking laws, and can result in legal liability to the City.

Street cleaning activities provide mechanical cleaning of residential, arterial and Central Business District streets, removal of debris and leaves from streets, cleaning of bike and pedestrian areas, vegetation management and street area landscaping, and de-icing of streets in weather emergencies. Traffic operations provides the public a contact point for issues regarding transportation system operations and neighborhood livability issues related to transportation and investigates and responds to traffic-related concerns from the public and other agencies. It also coordinates traffic management for special events, including athletic events, parades and the Rose Festival. These are key to ensuring that the transportation system provides for the effective and safe movement of people and vehicles in the city.

Equity Impacts

This program supports PBOT's 5-year Racial Equity Plan through its efforts to address the following goals:
1) Provide equitable services to all residents: PBOT's equity matrix is used to evaluate street and sign maintenance priorities, together with other factors, including condition. Where possible, street maintenance is delivered in collaboration with other bureaus or entities (TriMet, Oregon Department of Transportation, or others) to minimize the impact of road work on the traveling public.
2) Shift the culture of the bureau and end disparities in city government: Strategic asset management planning, currently in development, intends to inform street and sign maintenance priority according to the bureau's strategic goal areas. This work relies heavily on the bureau Equity Committee and bureau-wide understanding of racial equity and inclusion.
3) Use racial equity best practices to increase access for communities of color and immigrant and refugee communities: Use the Racial Equity Toolkit to improve street and sign maintenance decisions. Continue to use the racial equity matrix to identify Priority Maintenance Actions.

Changes to Program

There are no changes to the program's organizational structure, staffing or activities in FY 2019-20. In FY 2018-19, the program added staff to create an additional pothole repair crew, to grade and gravel some of the unpaved roads in the city, and create a night crew to increase the amount and frequency of pavement striping, to address sign issues (including knock-downs), and to support the closing and re-opening of roads during emergency and non-emergency situations.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	95,658	46,843	0	0
External Materials and Services	3,840,178	4,874,539	10,517,641	7,391,291
Internal Materials and Services	8,531,472	9,835,152	10,120,482	9,782,611
Personnel	10,884,146	12,112,619	17,351,854	19,567,296
Fund Expense				
Fund Transfers - Expense	53,503	44,703	51,248	50,000
Sum:	**23,404,957**	**26,913,856**	**38,041,225**	**36,791,198**
FTE	183	192	182.65	183.9

Resources: This program is supported primarily by General Transportation Revenue (GTR). It also receives about $2.0 million per year for four years from the 2016 voter-approved 10-cent gas tax – the Fixing Our Streets program which funds street base repair projects. This program replaces not just the surface asphalt, but also the rock base of the road which stops structural failure from spreading and prevents recurring issues. Funding for street preservation continues to fall short of what is needed to improve the average pavement condition of the street network.

In FY 2018-19, the City's General Fund reduced its support for Maintenance street cleaning activities by about $402,000. This reduction was backfilled by increased support from the Bureau of Environmental Services (BES) which has annually provided some support, since street cleaning provides stormwater management benefits by keeping debris out of the collection system. As directed by City Council, PBOT and BES determined the appropriate level of support that BES should provide to PBOT for street cleaning activities. As a result, the BES contribution will be reduced by $170,078 in FY 2019-20 and replaced by additional GTR resources. Other funding comes from interagency agreements with BES and the Water Bureau for street patching services. These resources have been steady in recent years and are anticipated to remain so in the future.

Expenses: The primary expenses of the program are personnel costs, which are fixed, predictable and essential to delivering program services. Other major expenses are fleet and equipment operating costs and operating supplies such as asphalt, concrete, signs and paint, all of which are necessary to providing services and meeting program goals.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The Streets and Signs Program includes 183 positions, including program staff (e.g., utility workers, crew leaders, GIS technicians, equipment operators, schedulers), supervisors, an engineer and a program manager.

Assets and Liabilities: PBOT's street and sign inventory includes 4,852 lane miles of pavement, 37,911 street name signs, 1,189 miles of pavement markings, 61,444 parking signs, 5,333 crosswalks, and 58,779 traffic control signs. The estimated funding required to improve the condition of these assets to the target levels is $1.7 billion for pavement, $6.4 million for street signs, and $5.2 million for pavement markings.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Peter Wojcicki
Website:	www.portlandoregon.gov/transportation	**Contact Phone**	503-823-1751

Streetlights & Signals

Program Description & Goals

The Streetlights & Signals (SSL) program is responsible for the planning, design, operations, and maintenance of traffic control and lighting infrastructure. Traffic signals and street lighting (and the maintenance of this infrastructure) are integral to shaping our livable city. Our emphasis is on creating and maintaining streets that keep Portland a walkable, bikeable, and a mobile livable city.

Asset management is at the heart of the work that we do to track the program. Declining operations and maintenance funding for the program has resulted in fewer than two traffic signals being maintained each year, which would require the traffic signals to last more than 400 years. Previous asset management reports had the lifespan estimated at 30 years. The lack of a full replacement of the existing traffic signals results in higher ongoing maintenance costs, which further reduces the preventive maintenance that can be conducted by City staff.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of the High Crash Network that meets PBOT's pedestrian spacing crossing guidelines	N/A	N/A	N/A	10%	0

Explanation of Services

Traffic signals are vital to the mobility of society. They result in the safe crossing of people walking across many of our streets and help people travel distances by bicycle, scooter, and other vehicles. Thousands of people use each traffic signal every day.
SSL staff design, operate, and maintain traffic signals, beacons, and street lighting systems. The implementation of various equipment has included: Smart City sensors, the City's communications infrastructure, the TriMet traffic signal priority equipment, and traffic signal system monitoring equipment. These systems are integrated in a way that maintains the performance of the transportation system.
The occurrence of outages in the Portland traffic signal system is alarming. After hours responses are numerous due to the failure of equipment in the field as it lasts long past its useful life. Emergency repairs can result in higher costs and poor coordination between partners.
Our staff are directly responsible for customer engagement, receiving numerous calls per day complaining about the traffic signal operations and street lighting outages that occur throughout Portland. We have a special relationship with the accessibility community and receive requests directly from members with disabilities and mobility needs. These citizens are engaged directly in the work of the traffic SSL Division. Both citizens that are blind and those that use wheelchairs for mobility need accommodations at signalized intersections.

Equity Impacts

The Signals, Street Lighting, ITS, & Electrical Maintenance Division places places a strong emphasis on equity and supports Portland's Citywide Racial Equity Goals. The recent Civil Rights Education and Enforcement Center (CREEC) settlement has raised the awareness of the City as to the needs of these communities. The Oregon Blind Commission has helped prioritize the installation of accessible pedestrian signals and other crossing improvements by providing direct input and requests for upgrades to the existing infrastructure. People with mobility devices and people that need additional time at traffic signals also can directly request service and changes to the traffic signal timing that increase the safety of people on the streets. The bureau does collect information about whether complaints or requests are related to the Americans with Disabilities Act (ADA).

The Signals & Street Lighting Division has conducted some efforts to quantify the efforts of the Electrical Maintenance Section on Communities of Color within the City. Our efforts have focused on the response time related to Electrical Maintenance functions at traffic signals within the various geographic districts of the City and their corresponding score on the Equity Matrix. The hypothesis is that the geographic boundary created many years ago to organize work may not result in response rates that are commensurate with our newer equity goals. This redistribution of geographic boundaries was postponed as staffing for this equity evaluation of the Section was a lower priority than immediate safety response, project support, and other initiatives when engineering staff workload was a concern for the bureau.

The equity analysis completed as a part of the Street Lighting relamping project has served the SSL Division very well. Staff continue to use the City's Equity Matrix to identify priorities for limited funding for improvements to the street lighting system. The impact of the changes includes more rapid response to requests from the community and have resulted in improvements centered around areas where communities of color and people with disabilities regularly use the infrastructure (SE Division Street).

Changes to Program

The program has also been impacted by the significant additional infrastructure implemented by the Vision Zero efforts. This initiative has resulted in the addition of nearly 80 Rectangular Rapid Flashing Beacons (RRFB) which will also require maintenance and have increased our installations by nearly 8%.

• The increase in traffic signal equipment and lighting does not appear to be waning. In fact, the Interties for the Division has increased 200% in the past three years. This has resulted in the Division maximizing the use of consultants to complete projects both through flexible services contracts that are in control of the Division and that of others (including Civil Design).

• The City has experienced a number of lawsuits in the past year that has required a considerable amount of time from staff to support the City Attorney's office.

• The other large increase for service that has occurred was the installation of Smart City sensors. The Mayor's Office directed staff to install 200 new facilities with devices to measure volume on the SE Division, SE Hawthorne, and SE 122nd Avenue corridors. This increase in equipment has come with challenges related to the equipment, of which the impacts to staff time are unknown at this time.

• The organizational structure has changed in the past year to include more robust management of both the Electrical Maintenance Team and the addition of a new section to handle Asset Management, Inspections, and Small Cell sites. This has resulted in significant more collaboration and communication within the organization.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	22,193	760	0	0
External Materials and Services	2,958,071	2,979,314	5,550,726	4,505,366
Internal Materials and Services	1,118,650	1,500,553	986,070	738,500
Personnel	4,982,777	5,264,424	6,073,767	6,559,394
Fund Expense				
Contingency	0	0	2,655,862	12,061,500
Sum:	**9,081,691**	**9,745,051**	**15,266,425**	**23,864,760**
FTE	31.58	34	44.72	44.72

Resources: This program is funded by General Transportation Revenue and by federal and state grants, System Development Charges, Fixing Our Street revenues, HB 2017.

Expenses: The primary expenditures include personnel, consultants, materials, Fleet costs, and equipment for planning, design, and construction projects.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program employs electricians, auto equipment operators, engineers and engineering technicians, GIS tech, signal and street lighting technician, management analyst, electrical supervisor, managers overseeing the program, management analyst and communication engineer.

Assets and Liabilities: Once the projects are constructed, the City mostly own the assets which includes signalized intersections, beacons, variable message signs, street lighting, and other infrastructure.

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Peter Koonce

Contact Phone 503-823-5382

Sidewalks, Bridges & Structures

Program Description & Goals

The Sidewalks, Bridges, and Structures program consists of PBOT Maintenance Operations activities that inspect, maintain, and repair the City's sidewalks, curbs, corners, guardrails, fences, bridges, stairways and retaining walls, work that is essential to providing public safety, mobility and accessibility.

This program is responsible for ensuring the City's corners and sidewalks adhere to federal Americans with Disability Act (ADA) standards through posting sidewalks that are out of compliance and by improving or installing ADA-compliant curb ramps. In addition to meeting federal and state requirements around asset condition, this program maximizes the City's lifetime commitment and investment by preserving existing assets, preventing deterioration, and avoiding costly repairs and loss of asset use.

Performance measures for this program include:

Percentage of PBOT-owned bridges in non-distressed condition. Success is 80% or more of bridges in non-distressed condition and PBOT has exceeded this level over the past several years.

Number of ADA curb ramps improved or constructed. PBOT has been working to increase the number of ADA-compliant curb ramps installed. Performance in this area is trending upwards to meet the Civil Rights Education and Enforcement Center (CREEC) settlement agreement and PBOT anticipates improving or constructing over 1,500 curb ramps in this budget year.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of PBOT-owned bridges in non-distressed condition	85%	84%	85%	85%	0
Number of corners improved or constructed to meet ADA compliance	N/A	N/A	N/A	1,500	0

Explanation of Services

Portland's sidewalk system is made up of sidewalks, corners, and curbs. The system provides pedestrians with a safe way to access transit, neighborhood businesses, parks, and schools. Curbs not only mark the edge of the pedestrian network, but also channel water to the drainage system, which helps preserve street pavement. This program maintains sidewalks and corners, including installation of ADA-compliant corner ramps. These activities make travel easier and safer for people with disabilities and the elderly.

Structural maintenance activities include retaining wall and tunnel repair, bridge and vaulted walk maintenance, installation and repair of roadside barriers (guardrails and attenuators) that are a key component of roadway safety, structural inspections and design, and installation and repair of stairways, fences and bike racks. These activities ensure that these assets are available and functioning properly and remain a safe and viable part of the transportation system for vehicles and pedestrians.

Community members provide input to this program by reporting assets, such as sidewalks, that are hazardous and in need of repair and by requesting the installation of new assets, such as corner curb ramps to improve mobility.

Equity Impacts

This program supports PBOT's 5-year Racial Equity Plan through its efforts to address the following goals:
1) Provide equitable services to all residents: PBOT proposes using its equity matrix to prioritize ADA-compliant curb ramp installations, together with other factors including location and number of requests. ADA-compliant corners are also installed as part of pavement improvements and other capital projects led by utilities, TriMet, the County, and the State. Where possible, PBOT Maintenance Operations partners with other agencies to deliver compliant curb ramps as part of other capital projects.
2) Shift the culture of the bureau; end disparities in city government: Maintenance of structures, including sidewalk inspections, will be evaluated as part of the bureau's Strategic Asset Management Plan which is in development. This plan intends to prioritize racial equity and inclusion in identifying maintenance priorities and will rely heavily on the Bureau Equity Committee and bureau-wide understanding of racial equity and inclusion.
3) Use racial equity best practices to increase access for communities of color and immigrant and refugee communities: Continue to use the racial equity matrix to identify Priority Maintenance Actions.

Further, this program supports disability equity through its work improving corners to meet federal ADA standards. Sidewalk connectivity is also prioritized as part of new construction, including wider sidewalks which are better able to accommodate persons with mobility disabilities.

Changes to Program

To meet the workload demands of completing ADA corner ramp installations, Fixing Our Streets projects and ongoing sidewalk maintenance, three positions have been added to the Sidewalks program in FY 2019-20. There are no other changes to the program's organizational structure, staffing or activities in FY 2019-20. Budgeted program resources and expenditures will be increased in the Sidewalks program to fund the new positions but otherwise, resources and expenditures will be similar to FY 2018-19.
The primary funding source for this program is General Transportation Revenue (GTR) which will increase to cover the new positions and inflation in FY 2019-20.

The 2018 CREEC (Civil Rights Education and Enforcement Center) lawsuit settlement requires the City to make accessibility improvements by installing or fixing an average of 1,500 accessible curb ramps each calendar year for the next 12 years starting in 2018, including curb ramps requested by persons with mobility disabilities. Some of this work will be done through capital improvement and permit projects that are part of other PBOT program offers. However, starting in FY 2018-19, 600 ramps per calendar year on average will be completed by the Maintenance Operations Sidewalks section, an increase in the number of ramps done in prior years.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	9,973	0	0	0
External Materials and Services	2,060,174	2,205,267	3,013,497	3,001,976
Internal Materials and Services	1,095,428	2,351,587	1,056,992	288,817
Personnel	3,240,534	3,784,717	5,290,947	4,460,529
Fund Expense				
Contingency	0	0	-372,995	5,344,813
Fund Transfers - Expense	0	0	15,000	0
Sum:	**6,406,109**	**8,341,571**	**9,003,441**	**13,096,135**
FTE	53	62	62.4	65.4

Resources: This program is supported primarily by General Transportation Revenue (GTR) which will increase in FY 2019-20 to cover the cost of adding new positions and capacity to the Sidewalks program an to cover inflation. The program also receives $1.5 million from the Build Portland Program City Council created in 2017 to finance upgrades to critical city infrastructure, including transportation improvements. Other funding comes from interagency services provided to other City bureaus, from TriMet for the installation of concrete pads in streets at bus stop locations, sidewalk repair/inspection fees paid by citizens and contractors, and reimbursement from property owners for sidewalk repairs done by the City.

These resources have been steady in recent years and are anticipated to remain so in the future. The sidewalk posting fees charged to the public are set to recover program costs and are not deemed to impact the ability of citizens to access services.

Expenses: The primary expenses of the program are personnel costs, which are fixed, predictable and essential to delivering program services. Other major expenses are fleet and equipment operating costs, and operating materials such as cement and materials to fix guardrails and other structures, all of which are critical to providing services and meeting program goals.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The Sidewalks, Bridges and Structures Program includes 65 positions, including field staff (utility workers, welders, carpenters, painters, concrete finishers, inspectors, technicians and equipment operators) and supervisors.

Assets and Liabilities: There are 3,155 miles of sidewalks, 38,231 corners, and 3,150 miles of curbs in the city. In addition, there are 152 bridges, 190 stairways, 23 miles of guardrails, 590 retaining walls and almost a mile of harbor wall in the City. The estimated funding required to improve the condition of these assets to target levels is $73.0 million. This does not include the cost of improving sidewalks, as adjacent property owners are financially responsible for repairing sidewalks.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Amy Roberts
Website:	www.portlandoregon.gov/transportation	**Contact Phone**	503-823-1769

Streetcar Operations

Program Description & Goals

The Streetcar connects neighborhoods, employment centers and cultural destinations around the central city with seven-days-a-week service, from Northwest Portland to the Pearl, Portland State University (PSU), South Waterfront, OMSI, Central Eastside and Lloyd, crossing the Broadway Bridge and the Tillikum Crossing. The program provides both transportation mobility and an incentive for denser, urban development. As the streetcar has expanded, the collaboration between public and private partners has resulted in affordable housing, public open spaces, and brownfield redevelopment. The Portland Streetcar is owned by the City of Portland and operated by the Bureau of Transportation (PBOT) in partnership with TriMet (the regional transit agency) and Portland Streetcar, Inc. (PSI), a nonprofit that provides management support and private sector advocacy.

With it's 5-Year Strategic Plan, Portland Streetcar tracks a number of performance measures and provides an annual report to City Council on the program. Key performance measures include annual streetcar ridership, percent of operating budget provided by fare revenue, and percent of on-time performance. In April 2018, Streetcar had its highest average weekday ridership of 16,650, and a FY 2017-18 total of 4.87 million. On-time performance for FY 2017-18 was 85%, 84%, and 79% respectively for the NS Line, A Loop and B Loop.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Streetcar on-time performance	79%	82%	83%	90%	0
Percentage of Streetcar fare revenue contribution to operating budget	14%	13%	15%	20%	0
Annual Streetcar ridership	4,720,474	4,870,556	5,200,000	5,000,000	0

Explanation of Services

Portland Streetcar began service July 20, 2001 with a 2.4-mile alignment (4.8-miles round trip) from Portland State University to NW 23rd Avenue. Now, after 17 years, five extensions, and more than 50 million riders, Portland Streetcar operates three lines around 16-miles of track in Portland's Central City.

The North | South (NS) Line operates on eight-miles of track from SW Lowell and Bond in the South Waterfront to NW 23rd and Marshall in the Alphabet District connecting PSU, the Central Business District, and the Pearl District. The A and B Loops operate two circular routes connecting the Pearl District, Lloyd District, Central Eastside Industrial District, Central Business District and PSU in clockwise (A Loop) and counter-clockwise (B Loop) loops around the Central City. All three lines operate at 15-20 minute frequencies with 7-10 minute frequency through the Central Business District, PSU and the northern South Waterfront District where two lines overlap.

Hours of Operation are Monday – Friday, 5:30 am to 11:30 pm, Saturday, 7:30 am to 11:30 pm, and Sunday, 7:30 pm to 10:30 pm.

As the nation's oldest modern streetcar line, Portland is an example of how streetcars beneficially shape growth to create more sustainable and equitable cities. Since Streetcar began operation in 2001, the City has added over 17,000 new residential units along the transit corridor, including one-third of all affordable units. In 2017, more than half of the housing units built in Portland were built along the Streetcar corridor. Portland Streetcar has also proven to be a strong signal to property owners and employers, who have increased private investment and grown job opportunities. Across the country, major employers cite streetcar systems as one of the reason they are investing and growing within cities.

Our contractor, PSI, engages the private sector through a volunteer Board and also staffs the City's Streetcar Advisory Committee. PSI's leadership on the HB 2017 Transit Advisory Committee for Portland Streetcar included working with community advocates, OPAL, other municipalities and counties to identify shared values and recommendations for apportionment of future resources to improve service frequency and reliability.

Equity Impacts

Our Customers - The Streetcar service area includes a diversity of customers by age and income. Thirty-two percent earn an annual income of less than $30,000. Streetcar operators deploy the mobility ramp more than 30 times an hour to assist passengers, many of whom may have disabilities. Forty-nine percent of all housing units built in Portland in the last 20 years are within ¼ mile of Streetcar tracks, including 6,659 regulated affordable housing units.

Fares - With the introduction of the HOP Fastpass customers can pay as they go for transit, without the upfront cost of a monthly or annual pass, and still obtain the daily and monthly cap. Additionally, Streetcar provides a ½ fare of $1.00 as well as the TriMet $1.25 fare for Honored Citizens. In FY 2019-20, Streetcar will participate in the Low-Income Fare Program managed by TriMet and made possible by the HB 2017 investment.

Title II and Title VI - As a transit provider, we strive to meet the need needs of our customers and work collaboratively with TriMet on Title II reasonable accommodation requests and Title VI Civil Rights compliance.

Changes to Program

Proposed changes to the division include the addition of an Assistant Operations Manager (swing-shift) and the replacement of a contract position with a City Senior Administrative Specialist.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	10,549,089	10,553,592	11,998,398	12,136,206
Internal Materials and Services	248,625	333,249	214,690	250,955
Personnel	1,544,714	1,917,959	3,287,637	3,509,714
Fund Expense				
Contingency	0	0	0	391,984
Sum:	**12,342,428**	**12,804,800**	**15,500,725**	**16,288,859**
FTE	24	26	26.5	28.5

Resources: The operating budget is funded by General Transportation Revenue (GTR), TriMet, fare revenue and sponsorships obtained by Portland Streetcar, Inc. (PSI). Capital expenditures are covered by System Development Charge fees, energy tax credits, and programmed parking facility funds as well as designated parking revenue, and GTR.

Expenses: The primary expenditures for this program are staffing costs and ongoing asset maintenance. Additional capital expenditures include payments to TriMet for development of the HOP Fastpass system and purchase of three additional Streetcar vehicles from Brookville Equipment.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program has 27 city staff as well as contracted staff.

Assets and Liabilities: The division is responsible for the ownership and maintenance of the Portland Streetcar system, including track, Overhead Catenary System (OCS), facilities, and vehicles. The goal is to have 100% of the Streetcar system, including vehicles in fair or better condition. The bureau currently meets that target, and we are looking ahead to developing a mid-life refurbishment plan for seven of the oldest vehicles with the assistance of a vehicle engineer. Portland Streetcar has a Transit Asset Management (TAM) plan and is committed to maintaining our assets in a State of Good Repair (SGR).

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Kathryn Levine

Contact Phone 503-823-7085

Engineering

Program Description & Goals

The program provides technical support for Capital Improvement Plan (CIP) projects that provide safety, enhance neighborhood access and livability, preserve and rehabilitate facilities, and support land use through improvements to the City's streets, bridges, traffic signals, street lights and many other assets. With the increase in funding over the past few years (Fixing Our Streets, House Bill 2017, and Build Portland) the number of projects has doubled. Our goal is to design, construct, inspect, maintain and operate a safe transportation system for all modes in support of the Bureau's and City's goals.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of annual budgeted Capital Improvement Plan expended	N/A	N/A	N/A	90%	0
Percentage of capital projects that complete their planned annual schedule	N/A	N/A	N/A	0	0
Percentage of projects substantially complete within 25% of construction project budget	N/A	N/A	N/A	90%	0

Explanation of Services

The Engineering Services Group provides the following services:

• Technical support for capital projects including structural, civil and traffic engineering, and construction inspection and survey services. The Surveying section provides surveying for the Bureau of Environmental Services projects in addition to PBOT's projects.

• Provide operations and maintenance on the City's 950 signals (as well as another 150 signals on ODOT's system in the City) and 56,000 streetlights.

• Provide asset management for the City's signal and street lights, 4,800 lane miles of streets, 152 bridges, 590 retaining walls, 190 stairways, 29 miles of guardrail, and many other assets.

• Lead and is responsible for meeting the City's settlement with the Civil Rights Education and Enforcement Center (CREEC) which requires the construction of 1,500 ADA ramps per year for the next 12 years.

• Leads the City's efforts on the City's Standard Specifications and Details which is used on every project in the public right-of-way for the Bureau of Environmental Services, the Water Bureau, Portland Parks and Recreation, PBOT as well as all permit projects.

Our responsibility is to design, maintain, and operate the transportation system for all modes and to deliver projects on time and budget.

Equity Impacts

The ADA Curb Ramp program that is part of the CREEC settlement brings accessibility improvements that span the citizenry and geography of the entire City. Curb ramps are key to providing an accessible transportation system by helping people (especially those with mobility challenges) get out of the street and over the curb and to the sidewalk. The program provides management, engineering design, and construction inspection services to provide the 1,500 ADA compliant curb ramps per year for the next 12 years as required by the City's ADA Curb Ramp Settlement (aka CREEC Settlement). Curb ramps are accomplished by capital improvement projects, permit projects, and the street maintenance paving program along with other ramps built in accordance with the prioritization set by the ADA (e.g. government offices, schools, parks and public services, transportation coordinators, hospitals, and places of public accommodation.)

Changes to Program

The City's ADA Curb Ramp Settlement, which became effective in September 2018, doubled the number of curb ramps to be designed, inspected and constructed by the City annually (from 750 to 1500). In addition, the Settlement Agreement calls for (1) the City's Ramp by Request intake system to meet ADA accessibility standards; (2) additional training of consultants and staff throughout the various City bureaus; (3) development of electronic inspection and verification forms to be used by inspectors in the field; (4) upgrades to the City's GIS system to provide an inventory of surveyed curb ramps throughout the City; and (5) annual reporting to Civil Rights Education and Enforcement Center (CREEC) counsel and the federal district court.

To accomplish these things, the "CREEC Squad" unit was created, containing four technical staff, two street inspectors, four ADA Technical Advisors, along with additional computer aided drafting personnel to handle the increased drafting workload on capital improvement projects due to increases in ADA related scopes. The Engineering Service group has also increased engineering and construction capacity through on-call consultant contracts and fixed price agreement contracting.

With the large increase in funding and the number of projects, we have been utilizing flexible services contracts with consultants and also hiring new staff to deliver these projects.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	33,532	46,165	1,300,000	2,852,571
External Materials and Services	258,570	732,389	720,274	1,487,145
Internal Materials and Services	541,181	550,097	219,605	290,000
Personnel	3,488,287	3,886,902	4,929,246	5,157,565
Fund Expense				
Contingency	0	0	-110,000	
Sum:	**4,321,570**	**5,215,552**	**7,059,125**	**9,787,281**
FTE	72.1	74.3	31.94	32.49

Resources: The vast majority of Engineering Services is funded by Capital improvement plan projects that utilize both General Transportation Revenues and General Fund resources, and outside funding (Transportation System Development Charges, Federal, Oregon Department Of Transportation, Port, TriMet, etc). These funds cover the design, inspection and construction of projects.
The ADA Curb Ramp Program is funded through a combination of PBOT capital improvement plan (federal and state grants, system development charges, Fixing Our Street, HB 2017, Build Portland), Prosper Portland, and one-time General Fund resources.

Expenses: Our primary expenses are for personnel, equipment and materials to design, build and inspect projects that are part of bureaus' budget and meet the City's and Bureau's goals and objectives.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: This program has various engineering and technical staff in the FY 19-20 Budget.

Assets and Liabilities: The CREEC ADA Settlement Agreement provides for significant reduction of culpability provided the terms of the Agreement are met. When compared to other similar jurisdictions, this reduction is estimated to be in the range of $200.0 million - $800.0 million.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Steve Townsen
Website:	https://www.portlandoregon.gov/transportation	**Contact Phone**	503-823-7144

Planning

Program Description & Goals

Transportation Planning synthesizes community values into an overall policy direction to guide the development of Portland's transportation system. The Planning program engages Portlanders to develop a sustainable vision, long-range plans, and investment strategies to meet our future transportation needs. Planning integrates the needs of all modes of transportation, along with other functions of our streets, into the planning and project development process. Planning works to prioritize transportation investments and resolve policy tradeoffs associated with different uses of our right-of-way. For FY 2019-20, this program has not yet identified the right performance measures. This will be developed in FY 2019-20 in time for budget development for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Planning Program primarily consists of three working sections: Policy Innovation and Regional Coordination, Area and Project Planning and Complete Streets Planning sections.

The Policy Innovation and Regional Collaboration section develops City transportation policy and coordinates with other related bureaus and policies to guide the planning, investment, and priorities of the transportation system. This includes: establishing and maintaining compliance with state and regional policies and plans through the Transportation System Plan; integrating transportation and land use planning through coordination with the Comprehensive Plan; representing Portland at regional and state transportation policy and planning bodies; and developing long range plans and performance-based planning and programming practices that advance achievement of city planning goals.

The Area and Project Planning section develops multimodal area and corridor transportation plans for Comprehensive Plan Designated Centers, Corridors, and Employment Districts, including adjacent areas. This section translates and applies citywide policies to specific areas of the city and it leads in the development of new and innovative planning and capital project initiatives.

The Complete Streets Section leads the preparation of modal plans and integration of these plans into multimodal policies, investment strategies and the process for street design and improvement. The modal plans serve as a blueprint for completing the networks for pedestrians, bicycle, transit, freight and supporting adherence to ADA policy. Other activities include staffing modal advisory committees and advancing complete streets initiatives and specific modal coordination efforts.

The Planning group is in constant communication and engagement with the public on project planning and modal coordination. Through the use of community outreach events, neighborhood meetings, stakeholder meetings, direct mailings, media releases, email and using our website the planning group works to reach and hear from all of our customers to help determine the bureaus project goals and priorities.

Equity Impacts

The equity goals of this program include:
• Standardizing an equity matrix for PBOT to address Transportation infrastructure deficiencies in communities of color.
• Prioritization of projects using a standard template which includes a racial equity evaluation metric, to help address infrastructure deficiencies in communities of color.
• Shape and advance standard practices to increase outreach and engagement with Limited English Proficient (LEP) communities.

Changes to Program

Changes due to external factors: Increased project development work continues due to Fixing Our Streets and HB 2017 capital funding and increased requests from the capital program to prepare project concept plans. A funding grant from Metro for Streetcar for $375,000 will require additional project planning team activities in FY 2019-20 and FY 2020-21. There are no significant reallocations of bureau resources will be occurring to this program compared to prior years. There are no significant organizational structure changes to this program in the past year. The program added a Transportation Planning Manager and a Senior Management Analyst (which is funded 50/50 between PBOT and the Bureau of Environmental Services) in the FY 2018-19 Fall Budget Monitoring Process.

During the Proposed Budget phase, the Council directed the Portland Bureau of Transportation (PBOT) to develop a Transportation Resiliency Plan; this plan shall be funded within the bureau's current resources ($600,000 one-time in General Transportation Revenue funding). This plan will build off the 2016 Mitigation Action Plan and the Comprehensive Plan 2035, update the City's emergency transportation routes to reflect current policies and plans, establish a process for emergency transportation routes to be regularly updated, and conduct a seismic study of PBOT owned bridges.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	245,841	247,248	703,952	1,773,116
Internal Materials and Services	41,038	56,468	33,333	295,903
Personnel	1,722,642	1,953,859	2,443,641	3,264,178
Fund Expense				
Contingency	0	0	-77,424	0
Fund Transfers - Expense	150,000	0	0	0
Sum:	**2,159,521**	**2,257,574**	**3,103,502**	**5,333,197**
FTE	20.17	20.92	24	27

Resources: The primary resource that supports this program budget is General Transportation Revenue funding. The other major funding streams include capital project funding, Interagency revenue from the Bureau of Planning and Sustainability and a small amount from the General Fund focused on sustainability.

Expenses: The primary expenses of this program are personnel costs and professional/consulting services. The professional/consulting services allow for some budget flexibility and provide expertise needed on certain projects.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: To support the increased project workload (Fixing Our Street & Heavy Vehicle Use Tax), staffing levels within this program have increased by 2.5 FTE in the past year. These new positions included adding a Transportation Planning Manager, Senior Management Analyst (split 50/50 with BES) and making the ADA Transportation Planning Coordinator full time.

Assets and Liabilities: This program does not own any assets or liabilities.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Art Pearce
Website:	https://www.portlandoregon.gov/transportation/	**Contact Phone**	503.823.7791

Project Management

Program Description & Goals

A capital project is a long-term, capital-intensive investment plan with a purpose to build upon, add to, or improve a capital asset. Capital projects are defined by their large scale and large cost relative to other investments that involve less planning and resources. The Portland Bureau of Transportation has a Capital Improvement Plan investment portfolio of over $533.0 million in 133 projects over a five-year period. The bureau depends largely upon the Capital Project Managers within the Project Management Division to oversee project delivery outcomes and to deliver on the promises that the bureau has made to public.
The PBOT CIP is organized and guided by the following four goals:
Goal 1: Improve Transportation Safety
Goal 2: Maintain Transportation Assets
Goal 3: Enhance Public Health and Community Livability
Goal 4: Support Economic Vitality

It is our responsibility to be good stewards over the public dollars dedicated to the capital projects and to maintain public trust. We will work in partnership with other bureau divisions, partner agencies and organizations, and community stakeholders to deliver projects that align with the bureau's strategic planning objectives, and implement the City's long-term infrastructure needs and community desires related to safety and livability, capacity and efficiency.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of annual budgeted Capital Improvement Plan expended	N/A	N/A	N/A	90%	0
Percentage of capital projects that complete their planned annual schedule	N/A	N/A	N/A	0	0
Percentage of projects substantially complete within 25% of construction project budget	N/A	N/A	N/A	90%	0

Explanation of Services

The Project Management Division is responsible for "cradle to grave" management of capital projects and assures that the four phases of project delivery - project development/planning, engineering and design, construction and closeout - come together to ensure that projects are delivered within scope, on schedule and within budget. Project managers on complex capital projects work to optimize the available resources (budget and schedule) in consideration of the scope of the project while operating under both known and unknown constraints all while accommodating the requirements of funding partners and other stakeholders.
Project managers also work with neighborhood partners, businesses, affinity groups, schools and other jurisdictions to build consensus in planning, scoping, designing and constructing capital projects that meet project requirements and community needs. The goal is to build projects that meet Portland policy and goals, increase economic prosperity, neighborhood livability, and safety.

Equity Impacts

Each project that is managed by the Project Management Division is reviewed and evaluated to determine the equity score received when the project was in the planning and project development phases. On a micro/individual level, the project managers use this information to help inform conversations with the community as they perform project-related public involvement tasks. As we take a systems-wide/macro approach, we use the equity matrix to help inform where projects will be implemented and when those projects will be installed.

Aside from being able to measure our effectiveness from a pure project delivery standpoint related to scope, schedule and budget, we hope to be able to provide metrics which speak to our effectiveness in addressing infrastructure disparity and inequity through the strategic delivery of capital projects in communities that have historically been underserved using contractors that have historically been underutilized. Given the amount of investment that will be made over the next five years, the Project Management Division has the opportunity to demonstrate an innovative approach to engaging and partnering with community.

The program will be working internally with our Contracting officers as well as with the City's Office of Procurement to develop strategies and a toolkit which will include standards, guidance, training protocols and reporting procedures for goals and utilization. This effort is one of the goals outlined in PBOT's Five Year Racial Equity Plan and one that directly affects the project managers and project outcomes.

Changes to Program

In the past two years the work of the Project Management Division has doubled. This is due funding that has come into the agency from multiple sources: Fixing Our Streets, House Bill 2017, Build Portland, the Recreational Cannabis Tax, and the formation of a record number of Local Improvement Districts. Additionally, our work with partner agencies such as the Oregon Department of Transportation and TriMet have introduced opportunities for us to be involved in strategic 'mega-project' relationships such as I-5 Rose Quarter, SW Corridor, and Division Transit. As such, we have had to make two critical moves to ensure that we were prepared to assume the additional work. The first major move was to increase staff. As we evaluated the project manager's individual workloads, we were made keenly aware that we would need to hire additional staff if we were to meet the needs of our strategic goals and the stakeholder's expectations. A second major shift was to re-evaluate the existing project delivery model. Given that the bureau was going to be asked to do more than it had even been asked to do within a similar time period, we recognized that we needed to ensure that our systems and processes were in alignment and could handle the additional throughput. Intentional efforts were started, and are still underway, to ensure that all relevant parties in project delivery are a part of the realignment process.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	76,820	54,202	1,372,323	70,000
Internal Materials and Services	37,286	7,029	0	0
Personnel	248,511	223,378	795,200	540,900
Fund Expense				
Contingency	0	0	-400,000	0
Fund Transfers - Expense	-950,000	0	0	0
Sum:	**-587,383**	**284,609**	**1,767,523**	**610,900**
FTE	0	0	2	

Resources: Primary resource for Project Management is General Transportation Revenues.

Expenses: The primary expenditure for this program is personnel.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program includes two budgeted FTE.

N/A

Assets and Liabilities:

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Millicent Williams
Website:	https://www.portlandoregon.gov/transportation	**Contact Phone**	503-823-4229

On-Street Parking

Program Description & Goals

The On-Street Parking Program supports traffic safety, access to goods and services, economic vitality, and neighborhood livability, by using data to manage public parking and develop parking programs and regulations in the right-of-way. This program manages on-street parking citywide, including parking meter districts, parking permit areas, timed parking zones, special parking zones, and other parking controls. The program works with residents, business owners, City traffic engineers, the Portland Police Bureau, Portland Fire & Rescue, Portland Streetcar, and Trimet, to design and operate an effective parking system.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
On-street parking expenses as a percentage of revenues	23%	21%	23%	20%	0
Number of Transportation Wallets sold	N/A	N/A	N/A	0	0
Number of area parking permits issued	N/A	N/A	N/A	0	0
Number of area parking permit 'opt-outs'	N/A	N/A	N/A	0	0
Number of special parking permits issued	0	N/A	0	2,600	0

Explanation of Services

The on-street parking system is managed to enhance traffic safety, improve circulation, support the economic vitality of business districts, encourage the use of off-street parking, reduce congestion, maintain air quality, and promote the use of alternative modes by managing the supply and price of on-street parking. Meter districts support economic vitality and access to services by encouraging turnover of parking spaces. Outside of the downtown meter district 51% of the net meter revenue is invested back into the district by funding transportation projects and programs. This provides an important incentive for neighborhoods to install meters and actively manage their on-street parking. Parking permit areas support neighborhood livability and access by discouraging long-term parking by commuters. Price has shown to be a good tool to manage parking and in two of the permit areas a permit surcharge is added to the base cost of a permit and these funds go back to the districts to fund transportation demand management tools such as the Transportation Wallet to reduce the demand on on-street parking. Timed parking zones in business districts and loading/unloading zones in business and commercial areas support economic vitality. Special parking zones adjacent to hospitals, schools, and other institutions support access to services.

The On-Street Parking Program continuously works to improve efficiency and effectiveness in providing parking management, maintaining parking meters, and processing parking permits. This program has developed initiatives to improve equity, access, and customer service, including;

- Parking Kitty app for mobile payment at parking meters,
- Transportation Wallet program to encourage multimodal transportation,
- Disabled parking permits and scratch-off tickets to accommodate drivers who may have trouble walking to and from meters, and
- Reduced permit fees for low-income residents and workers in Central Eastside and Northwest Portland.

Parking Kitty is the mobile payment app that allows customers to use their mobile phone to pay for on-street parking. Parking Kitty helps consumers reduce clutter by allowing them to ditch cash, physical credit cards, and even paper receipts. It can save time for customers who would like to start re-start a parking session without taking the time to go back to their vehicle. In addition to customer convenience it also reduces PBOT bank transaction fees; there is no bank fee added when customers purchase an additional session with Parking Kitty.

The Transportation Wallet is a suite of passes and memberships for people to use active transportation and is available to residents and employees free or at a substantially reduced price. Since the Wallet was launched in 2016 over 2,000 Wallets were purchased or provided for free in NW and Central Eastside.

Equity Impacts

The On-Street Parking Program actively engages in accommodating disability parking throughout the city to better serve the needs of disabled residents and visitors. On-street disability parking signs are installed to designate spaces disabled spaces and wheelchair spaces. There are also a permit programs that serve disabled placard holders, so they may park with reduced cost within metered areas where they live or work and achieve closer proximity to their destination. We also have a scratch-off permit program so that disabled parkers may stay longer in metered spaces than the allotted time (throughout the meter day if need be), and otherwise allow stays up to three hours when paying for a two-hour meter.

Projects and programs funded with permit surcharge and net meter revenue will be evaluated using the PBOT equity goals to help address infrastructure deficiencies and alleviate transportation burden on low income, underserved and communities of color. For example, there was outreach in the NW District targeted to low income residential buildings regarding the Transportation Wallet and other transportation projects and programs. Project lists are developed with input from advisory committees and the 2035 Comprehensive Plan policies relating to equity and community engagement.

Outreach conducted in existing parking districts, permit areas and during development of pilots and parking management plans will strengthen public engagement for communities of color and immigrant and refugee Communities.

The two parking districts that have added surcharge to their base permit fee have a low-income provision. Low-income residents do not pay the added surcharge if they meet the income guidelines outlined in their district.

Changes to Program

There has been increasing demand for parking services over the past years due to increased population, increased business activity, and new construction. The On-Street Parking Program works with stakeholders to provide parking services to accommodate increased demands and manage on-street parking based on parking utilization data. This includes expanding meter areas, implementing new area parking permit areas and expansions of existing permit areas to be consistent with the newly adopted Parking Management Manual, Transportation System Plan and the Comprehensive 2035 Plan.

Parking meter revenue has grown over recent years due to the implementation of new meter districts, the standardization of time limits, and other changes. Parking permit revenue has grown due to increased number of permits issued.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	4,483,326	4,947,355	7,482,900	7,599,396
Internal Materials and Services	428,320	298,662	187,312	110,604
Personnel	3,115,712	3,293,642	3,895,688	4,014,100
Fund Expense				
Contingency	0	0	-360,500	13,117,738
Sum:	**8,027,358**	**8,539,660**	**11,205,400**	**24,841,838**
FTE	31.75	31.9		

Resources: This program generates revenue from parking meter and parking permit fees. Meter district revenues pay for capital, operating, and maintenance costs of the meter system. Permit revenues pay for permit processing. Any remaining revenues are allocated to support transportation services within meter districts, permit areas, and citywide.

Expenses: The main expenses for managing the parking system are parking meter machines and parts, meter back-office fees, bankcard processing fees, and consultant contracts. This program has set-aside in contingency for future planned expenditures. This includes meter revenue set aside for future capital replacement costs, net meter revenue set aside for future district projects, and area parking permit surcharge revenue set aside for future permit area projects.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The On-Street Parking Program includes ten engineering and meter technician positions, 12 coordinator positions, 12 customer support, analyst, and manager positions; about five of these positions provide services for the Parking Garage Program. This program has added positions in recent years, to provide parking services for new meter districts and new parking permit areas, including Central Eastside and Northwest Portland.

Assets and Liabilities: This program owns and operates roughly 1,900 parking meters. 85% are in very good condition, and 15% are in good condition.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Chris Armes
Website:	www.portlandoregon.gov/transportation/	**Contact Phone**	503.823.7051

Parking Enforcement

Program Description & Goals

The Parking Enforcement Program's mission is to ensure equitable and convenient access to parking in the public right-of-way. The program's vision is to be nationally recognized as the most innovative and community-focused parking enforcement agency. The program is guided by the following principles:

• Commitment to People – We respectfully and actively collaborate internally, with public and private agencies, and with members of the community.

• Health and Safety – We are committed to ensuring the health and safety of our employees and the community.

• Innovation – We strive to be flexible, adaptable, and embrace new technology.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of abandoned auto complaints received	N/A	N/A	N/A	0	0
Number of derelict RVs reported	N/A	N/A	N/A	0	0
Number of parking citations issued	N/A	N/A	N/A	265,000	0

Explanation of Services

The Parking Enforcement Program supports traffic safety, access to goods and services, economic vitality, and neighborhood livability by educating the community and enforcing parking regulations in the right-of-way. Enforcement includes written warnings, citations, and in some cases towing.

This program patrols by foot, bike, and automobile in the parking meter districts, parking permit areas, timed parking zones, and special parking zones. The program also responds to service requests citywide including, but not limited to, blocked travel lanes, blocked driveways, blocked fire hydrants, and abandoned automobiles. The program also installs and removes temporary reserved parking signs, collects money from meters and provides compassionate and flexible enforcement with community members living in automobiles and recreational vehicles on the right-of- way.

Equity Impacts

Consistent enforcement of ADA ramps and disabled parking spots increases the likelihood that the ramps and parking spots will available to community members that need them. From 2016 to 2018 Parking Enforcement increased the number of citations written for improperly parking in a disabled spot by more than 40% (1,742 to 2,503). Citations for blocking ADA ramps increased by more than 24% from 2016 to 2018 (1,588 to 1,981).

The Parking Enforcement Program is engaging the community to help update the wording on citation envelopes/ enforcement website, and have it available in Portland's safe harbor languages. This will take time, but in the end the message will be better understood which will enhance compliance and build trust between marginalized communities and Parking Enforcement.

This program supports PBOT's five-year Racial Equity Plan and other bureau equity goals related to racial and disability equity.

• People of color make up 23% of Parking Enforcement staff.

• In December, four members of Parking Enforcement delivered holiday food baskets to low income households on behalf of the Portland Police Bureau's Sunshine Division.

• In 2018 Parking Enforcement made a commitment to enhance our relationship with the community in an attempt increase trust. In August, several members participated in "Shop with A Cop" which connects law enforcement with youth, who are often part of marginalized communities (low socioeconomic status, immigrants, people of color).

Changes to Program

There has been increasing demand for parking services over the past years due to increased population, increased business activity, and new construction. The Parking Enforcement program has increased staff over the years to respond to these changes.

This program continuously works to improve efficiency and effectiveness in enforcing parking regulations. Parking Enforcement has updated technology to better identify violations and track vehicles.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	450,000	100,000
External Materials and Services	216,907	247,609	801,705	774,529
Internal Materials and Services	412,480	559,097	514,765	624,591
Personnel	4,918,410	5,920,777	6,477,830	8,082,180
Fund Expense				
Contingency	0	0	-561,400	0
Sum:	**5,547,797**	**6,727,482**	**7,682,900**	**9,581,300**
FTE			77	

Resources: This program generates revenue by writing parking citations. Parking citations are issued by City staff, and then adjudicated and processed by the County Circuit Court. After processing payments, the Court retains slightly more than half of citation revenue and remits the remainder to the City. The City's share of parking citation revenue is projected to be about 75% of parking enforcement costs.

This program also helps generate parking meter revenue by increasing compliance with parking regulations, including payment at meters. Parking citation revenue and parking meter revenue are components of GTR, which provides funding for transportation services citywide.

Expenses: The main expenses for this program are staff costs, vehicle costs, handheld citation writing equipment costs, hearings fees, and training and uniform costs

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: This program includes 66 Parking Code Enforcement Officer positions and 11 customer service, coordination, and manager positions. This program added positions in recent years to provide parking services for new meter districts and new parking permit areas, including Central Eastside and Northwest Portland.

Assets and Liabilities: None.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Mike Crebs
Website:	www.portlandoregon.gov/transportation/	**Contact Phone**	503.823.1209

Parking Garages

Program Description & Goals

The Parking Facilities Fund supports the operation and maintenance of six City-owned parking garages in the downtown corridor. The parking garages support economic viability of Central City by providing an affordable system of parking garages which primarily meets the short-term needs of shoppers, visitors, and business clients. The Parking Facilities Fund also invests in the overall transportation system by funding other transportation needs only when there is a surplus.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of parking transactions processed	N/A	N/A	N/A	1,778,805	0
Percentage of parking garages in good or better condition	N/A	N/A	N/A	100%	0

Explanation of Services

The six City-owned parking garages in total house approximately 3,800 parking spaces, 71,800 square feet of commercial space, and the Portland Heliport. The garages are located at SW First and Jefferson, SW Third and Alder, SW Fourth and Yamhill, SW 10th and Yamhill, NW Naito and Davis and O'Bryant Square. Due to structural issues at O'Bryant Square it is no longer open to the public. SW 10th and Yamhill is being upgraded as part of a Capital Improvement Project which has resulted in a temporary closure of some parking spaces along with all the commercial space. The rebuilt garage is expected to be completely opened in September of 2019. The parking garages offer short-term parking, defined as four hours or less, is priced below market value to promote the need of those looking to conduct business downtown. The price point is designed to entice short-term users to park directly in the garages rather than increasing downtown traffic by circling for vacant on-street spaces. To align with PBOT's goal of reducing single occupancy vehicle trips, monthly carpool passes are sold to customers at a reduced rate.

Equity Impacts

SmartPark reduced rate swing shift parking passes offer parking in the garages at a reduced rate ($35 per month) for employees required to work swing shift (between 3 pm and 7 am) making less than $35,000 per year. The application for these passes is currently available in four languages (English, Spanish, Russian, and Vietnamese). The Reduced Rate Swing Shift pass is a direct response to stakeholder concerns about the impact of new downtown on-street parking rates on lower-income workers. On February 1, 2016, the City increased the on-street parking rate in Downtown from $1.60 to $2.00 per hour. During the discussion of this increase, stakeholders focused attention on how this increase could negatively affect downtown employees earning low wages, working swing or evening shifts and who are not well served by available transit options. To mitigate this impact, the SmartPark Program developed this monthly parking pass. The program provides a reasonable, low-cost option to lower income workers while leaving readily accessible on-street parking spaces available for evening customers and visitors.

Changes to Program

Changes due to external factors: The biggest external variable is demand for parking in the garages. While we are not anticipating an economic slowdown next year that would reduce demand, it is possible.
Changes to resources: We anticipate that the 10th and Yamhill garage will be fully open and operational by September of 2019. The completion of construction will bring the availability of spaces in the garage back up to full capacity. Additionally, we expect a bump in usage at the garage due to consumers preference to use a new, modern garage.
Changes to organizational structure: We do not anticipate any significant changes to the organizational structure next year.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	400,000	1,100,000
External Materials and Services	4,221,303	4,203,845	4,731,292	6,779,116
Internal Materials and Services	2,701,517	2,584,970	3,380,775	5,032,913
Personnel	307,696	403,797	475,952	735,600
Fund Expense				
Contingency	0	0	1,151,673	1,532,205
Debt Service	0	0	1,879,200	0
Fund Transfers - Expense	2,674,964	476,725	514,257	524,508
Ending Fund Balance	14,128,811	16,754,895	0	
Sum:	**24,034,291**	**24,424,232**	**12,533,149**	**15,704,342**

Resources: This program is paid by revenue generated from the five parking garages open to the public. The garages are owned by PBOT. Hourly, daily, and monthly parking options are all available in the garages. Ground floor retail space is also rented out. Other City bureaus also rent parking and storage spaces at the 1st and Jefferson Garage at the same rates offered to the public. As the parking garages have their own fund, they also receive interest revenue.

Expenses: The main expenses in this program are maintenance expenses, fees for the management of the garages, debt service for purchase of streetcars, capital improvements, and labor costs. The garages also transfer cash to the City's General Fund for overhead and expenses in lieu of property taxes. In the past the fund has also transferred funds to the transportation operating fund to help meet other priorities of the transportation system. Due to the current capital improvement and expected major maintenance projects we do not anticipate a transfer in the next five years.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The garages are staffed by external contractors.

Assets and Liabilities:	The major assets are the garages themselves (infrastructure) along with the land that they occupy. Other assets include the machines used to collect the fees along with the software used to operate these machines. Due to deferred maintenance, the assets need a significant amount of major maintenance over the next five years.

Program Information

Bureau:	Portland Bureau of Transportation	**Program Contact:**	Michael Jacobs
Website:	https://www.portlandoregon.gov/transportation/	**Contact Phone**	503.823.7527

Building Plan & Development Review

Program Description & Goals

The program provides development assistance and regulates development through setting right-of-way improvement and dedication requirements associated with private development's impact on the transportation system. The goal is to ensure that development meets City transportation goals, polices and city, state and federal laws. The program provides early assistance to developers through pre-application conferences and land use review. Information provided during the land use review process is then implemented at the time of residential and commercial building plan review or through the land division planning process. The Public Works Permitting processes is located within this program and provides concierge service to private consulting engineers and applicants as they develop public infrastructure plans to be built through development. Finally the Permit Engineering section within the program provides the engineering review needed to ensure compliance of City Code and local, state and national design standards in the final permitting of a public works permit.
Within each of the four sections in this division there are individual goals related to customer service and project delivery.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our Bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of PBOT public works permit reviews completed on-time	80%	94%	90%	94%	0
Number of Public Works Permit applications received	N/A	N/A	N/A	0	0
Total value of the public works PBOT infrastructure improvements permitted	N/A	N/A	N/A	0	0

Explanation of Services

The Development Services Division within transportation provides Concept to Permit issuance services for development activity. Applicants inquire often before purchasing property with the land use and building plan team for initial development feedback and to understand the regulations and requirements that will be applied to the development of the property. The land use review team reviews land use applications and traffic studies in order to support development applications while requiring and maintaining adequate public infrastructure to support the development impacts. The public works permit section provides a coordination service among the public works bureaus in the review of public works permits. This is a concierge service to the development community. Finally the public works permit review section is responsible for reviewing the technical and engineering drawings submitted for public works permits. This group assures new public infrastructure is designed to meet City and National standards including conformance with ADA regulations.

As properties within the City develop transportation infrastructure is needed to accommodate the additional demands placed on the transportation system. Additional sidewalk, bike lanes, travel lanes, pedestrian cross walks, signals and street lighting are all needed throughout the city. Additionally, right-of-way width is needed to provide for the needed infrastructure including storm water facilities for the Bureau of Environmental Services to manage stormwater. This program is responsible for placing requirements on development and reviewing design plans for permitting of the infrastructure.

The land use and building plan review sections within the division are responsible for setting development requirements for all aspects of development occurring throughout the city. These two sections require additional right-of-way dedications, sidewalk and bike lane improvements, signal and street lights and coordinate with urban forestry on the preservation or planting of new street trees. These sections also provide direction on location of driveways and other access requirements to allow of a safe transportation system operation. The public works permitting section and permit engineering teams intake and process the privately designed public works permit plans and provide the City's engineering review and oversight of the infrastructure that is built by private development applicants and given to the City to operate and maintain.

In 2017 the City reviewed and permitted nearly 26 miles of new or rebuilt sidewalk. This division also assessed and collected nearly $1,000,000 in Local Transportation Infrastructure Charges. The land use review team reviewed and provided findings early assistance responses on approximately 335 cases. The permit engineering team reviewed and issued approximately 155 public works permits in 2018. Public Works permitting issued 210 public works permits, and processed 14 public works appeals hearings.

The development services division has a high degree of community engagement with the design and development community. Staff from each section meet multiple times during the week for early assistance meetings, pre-application conference meetings, land use hearings, permit engineering concept intake meetings, permit engineering review meetings and often regular problem solving meetings with design engineers, planners and architects. Staff also participate in public works appeals hearings.

Equity Impacts

Development activity occurs in every neighborhood impacting all Portlanders. The work performed by these four sections ensures consistent application of city code and rules throughout the City attempting to require infrastructure to offset the transportation impacts that result from new development.

Changes to Program

There have been a couple recent positions vacated due to staffing changes. Given the recent economic forecast for development activity expected for the next 12-18 months these two vacancies along with two other current vacancies are anticipated to be left vacant until workload projections increase that would provide permit revenue to support the positions.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,405,485	1,924,692	423,000	423,002
Internal Materials and Services	11,031	5,133	822,528	525,920
Personnel	1,740,158	1,926,484	1,984,472	2,181,078
Fund Expense				
Contingency	0	0	1,338,601	4,695,608
Sum:	**3,156,674**	**3,856,308**	**4,568,601**	**7,825,608**
FTE	18.5	19	14.7	14.7

Resources: The program is funded by development permit fees.

Expenses: The primary expenditures in this program are staffing costs to assist developers and review development plans.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program has nine engineering technicians, three engineers, three planners, three supervisors and one program manager.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Kurt Krueger

Contact Phone 503-823-6964

Towing & PFHT

Program Description & Goals

The Towing & PFHT Program supports public safety, access, economic vitality, and neighborhood livability by regulating the private-for-hire transportation and towing industries in the City of Portland.

• The Private for-Hire Transportation (PFHT) section enforces regulations to ensure public safety, vehicle safety, customer service, and equitable access. Program staff inspects taxis, transportation network companies (TNCs), town cars, limousines, shuttles, non-emergency medical vehicles, pedicabs, and other for-hire vehicles. This program is developing initiatives to improve access, safety, and customer service, including; Safe Ride Home, Wheelchair Accessible Vehicle program (PDX WAV), discounted rides for low-income families, and business support for local minority-owned on-demand providers.

• The Towing section regulates vehicle tows from private property citywide. In addition, it administers the towing service contracts utilized by various City agencies, the Oregon Department of Transportation, Port of Portland, and Multnomah County Sheriff's Office. This program's work promotes the safe and efficient performance of towing services and provides consumer protections such as setting maximum towing rates and investigation of consumer towing complaints.

• The Derelict RV section addresses the issue of broken-down recreational vehicles on City streets used by people experiencing homelessness. This program works to identify, remove, and dismantle these vehicles to support neighborhood livability and promote public safety. Derelict RVs are vehicles that have non-functioning systems and may not be drivable. They have little or no salvage value, and it is cost prohibitive for owners to recycle them. PBOT works with people experiencing homelessness, local neighbors, the Portland Police Bureau, vehicle owners, and tow companies to remove these vehicles from City right-of-way, and either dismantle them or repair them to functional use.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of abandoned auto complaints received	N/A	N/A	N/A	0	0
Number of derelict RVs reported	N/A	N/A	N/A	0	0
Number of Private for Hire vehicles operating in Portland city limits	N/A	N/A	N/A	13,600	0
Number of Private for Hire field audits annually	N/A	N/A	N/A	3,500	0
Number of PDX WAV Rides	N/A	N/A	N/A	17,000	0
Number of Safe Ride Home trips provided	N/A	N/A	N/A	6,645	0
Number of Contract Tows	N/A	N/A	N/A	19,200	0
Number of Private Property Impound Tows	N/A	N/A	N/A	8,900	0
Number of RVs dismantled	N/A	N/A	N/A	390	0
Number of RVs towed	N/A	N/A	N/A	420	0

Number of abandoned vehicles towed	N/A	N/A	N/A	3,240	
Number of abandoned vehicles reclaimed	N/A	N/A	N/A	415	0

Explanation of Services

The PFHT section processes applications and issues permits for drivers, companies and vehicles, educates drivers, performs field audits including inspections and enforcement, issues penalty letters, attends hearings for appealed penalties and permit revocations, conducts and reviews driver background checks including criminal and driving records, investigates and responds to complaints, and analyzes ride data.

The PDX WAV program provides a central number for the public to call and request on-demand wheelchair accessible vehicles (WAV), facilitates passenger assistance, sensitivity and safety training for WAV drivers, pay subsidies to companies that fulfill on-demand WAV rides, collects and responds to complaints about WAV drivers and vehicles, and analyzes data related to WAV rides.

The Safe Ride Home program partners with the Portland Police Bureau, participating businesses and transportation companies to offer discounted transportation options on targeted holiday and event dates, with the goal of preventing people from driving under the influence. This program is coordinated with PBOT's Vision Zero team.

The Towing section sets maximum towing and storage rates, investigates consumer towing complaints, responds to calls about towed or abandoned vehicles, and performs field inspections.

The Derelict RV section responds to complaints regarding RV's and other vehicles being used as shelters on the right-of-way. PBOT staff working in pairs in the field, determine if vehicles are occupied, learn about the occupants, and work to alleviate the problem. Generally, unoccupied vehicles are towed after many days or weeks of investigation and notices. The vehicles are dismantled, with special care taken of hazardous materials and waste products. PBOT staff coordinate with Police bureau and other agency staff to assist derelict RV occupants and owners.

Equity Impacts

People with disabilities have long voiced concerns about the level of on-demand service for people in their community. This qualitative feedback was the impetus for developing a program for wheelchair accessible vehicles, PDX WAV, which will be launched soon. We also collect quantitative data on how many accessible rides were requested and how long a customer waits for wheelchair accessible rides from the time they request the ride. Through PDX WAV, we will be able to establish a better baseline, offer more reliable service which may increase the number of accessible rides requested, and survey customers about their experience to improve the program.

While we have yet to do a quantitative analysis of the companies disproportionately impacted by penalties issued for non-compliance with our industry regulations, we know that smaller minority-owned or majority minority-independent contractor companies are disproportionately affected. Our developing Minority Women Emerging Small Business (MWESB) support program aims to reduce the disproportionate impact. In the future, we may be able to track this information quantitatively through this new program and we will explore how we can do that.

Testimonials from the public also revealed that customer service was inconsistent. Through our new learning management system, we will require new driver trainings which we will be able to quantitatively track and report how many drivers participated in which trainings. We are exploring ways to collect customer experiences after trainings to see how the training is making a difference.

We are exploring a partnership with PBOT's Equity and Inclusion Program and the Vision Zero Program on a new set of Safe Ride Home events that are focused on supporting community-based organizations. This is a developing program and we will have more information about what kind of qualitative and quantitative data we can collect as the program becomes more defined.

As we translate key documents into Portland's Safe Harbor languages, we post them on our program websites. We are able to collect quantitative data on how many community members visit each of those translated pages.

Changes to Program

The Towing & PFHT Program has been rapidly evolving. In the past four years, we have seen a dramatic increase in the number of on-demand rides provided by taxicabs and Transportation Network Companies (TNC) such as Lyft and Uber. Towing & PFHT has increased staff in recent years in response to increased PFHT activity.

The FY 2019-20 Adopted Budget directs PBOT to continue to support the Derelict RV program. This program identifies, removes, and dismantles broken down recreational vehicles on city streets to maintain the public right-of-way, supporting public safety, and neighborhood livability by fostering clean and safe communities.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	389,191	782,742	3,357,286	2,618,205
Internal Materials and Services	176,851	488,155	1,560,512	2,346,331
Personnel	1,182,169	1,969,997	2,953,702	3,538,064
Fund Expense				
Contingency	0	0	0	6,351,364
Fund Transfers - Expense	-150,000	0	0	0
Sum:	**1,598,211**	**3,240,895**	**7,871,500**	**14,853,964**
FTE	14.73	17.38	25.9	33

Resources: This program generates revenue from service charges and fees. PFHT fee revenues continue to grow due to the increased number of rides provided.

Expenses: The main expenses for this program are staff costs, enforcement/ inspection costs, PDX WAV subsidy reimbursements, and Safe Ride Home vouchers. This program has set-aside in contingency for future planned expenditures. This includes PFHT fee revenue set aside for future computer system costs, auditing costs, and WAV program costs.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: This program includes 16 Regulatory Program Specialist positions and 10 coordinator, analyst, and manager positions. This program has increased the number of positions in recent years in response to increased PFHT activity. The FY 2019-20 Adopted Budget allocates an additional seven FTE to support the work on this program.

Assets and Liabilities: None.

Program Information

Bureau: Portland Bureau of Transportation

Website: www.portlandoregon.gov/transportation/

Program Contact: Mark Williams

Contact Phone 503.825.2486

Right of Way Use

Program Description & Goals

The program contains several right-of-way management and coordination. Right-of-Way Acquisitions (RWA) works with property owners to obtain property rights for public use. Portland in the Streets works with community members to allow a variety of local uses in the public right-of-way. Enforcement serves Development Permitting and Transit by providing centralized coordination and by helping to standardize the various enforcement programs within the group. Tram Management, Moving Events and Get Portland Moving are also within this program. For FY 2019-20, this program has not yet identified the right performance measures. This will be developed in FY 2019-20 in time for budget development for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

As properties within the City develop, right-of-way for public use may be needed for public uses such as roadways and sidewalks; additionally, entities may have a desire for private use of existing public right-of-way, either for more permanent usage through lease (parking and utility vaults) or temporary usage through permits (café seating, block parties, and smaller encroachments). These uses require legal documentation, either permanent recording against properties or temporary granting of permits, and they may also require enforcement actions to be taken. This program is responsible for coordinating those efforts.
RWA works with property owners to obtain property rights for public use through street vacations, easements, dedications and leases; additionally, they process all required right-of-way actions for both PBOT and the Bureau of Environmental Service (BES) capital improvement projects. Portland In the Streets (PITS) works with businesses, neighborhoods, and small community groups to allow local uses and livable programs within the public right-of-way through a variety of permits and functions. The program also provides centralized coordination and by helping to standardize the various enforcement programs within the group. RWA processes over 180 dedications, 100 leases, and five street vacations annually (FY 2017-18) as well as 135 acquisitions in support of capital improvement projects. PITS has issued 860 sidewalk café permits, 580 block party permits, and 20 encroachment permits (FY 2017-18). These actions are critical to organized operations and safe usage of the public right-of-way. RWA respond to applicants for projects, which can range from large developers familiar with the system to single-use customers that may need additional assistance beyond the norm. PITS is engaged regularly with varied community members and organizations, including communities of color and people with disabilities.

Equity Impacts

All activities within the program have developed forms and documents in compliance with ADA Title II and Civil Rights Title VI. PITS has a position that works on outreach to ensure that all communities are adequately served by the program, with specific emphasis on working with underdeveloped communities.

Changes to Program

Enforcement, Moving Events, and Get Portland Moving have been added to the program for this year. Enforcement is a newly created program and will be developed with program/staff as needed over the next fiscal year; Moving Events and Get Portland Moving are being reorganize into this program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	6,429	0	0
External Materials and Services	317,698	534,460	216,260	56,590
Internal Materials and Services	133,813	196,506	-313,927	1,579,672
Personnel	2,873,716	3,738,988	4,952,843	5,593,080
Fund Expense				
Contingency	0	0	-250,000	0
Debt Service	0	0	0	0
Sum:	**3,325,227**	**4,476,383**	**4,605,176**	**7,229,342**
FTE	29.17	30.24	45.16	46.16

Resources: The division is funded by street lease fees, street vacation requests, and community use permit fees. It is also subsidized by General Transportation Revenues (GTR).

Expenses: The primary expenditures for this program are staffing costs to manage the street leases, acquire rights-of-way, and review and approve street use permits.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: This program has seven development services technician, ten right of way agents, two office support staff, one project manager, four coordinators, two development supervisors and one division manager.

Assets and Liabilities: The division is responsible for the ownership and maintenance of the Portland Aerial Tram in partnership with Oregon Health and Science University (OHSU). Under the current funding agreement with OHSU, the City of Portland is obligated to cover 16.8% of annual Tram operating costs (estimated at $2.8 million). Current annual revenue is anticipated to cover the City's operating cost contribution making it the only non-subsidized public transportation in the City of Portland.

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Christine Leon

Contact Phone 503-823-7441

Utility Permitting

Program Description & Goals

The Utility Permitting program oversees the intake, monitoring and review of all street opening requests (i.e. utility trenching and repair permits) for all public and private utility applications. In addition, this workgroup reviews and issues environmental assessment permits (monitoring wells and underground tanks) in the right of way. As a related task, this program also verifies and tracks insurance and bond coordination for work performed in the right-of-way and conducts plan distribution for franchised and public utility reviews on both capital and developer driven right of way projects in the City. For FY 2019-20, this program has not yet identified the right performance measures. This will be developed in FY 2019-20 in time for budget development for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

Utility providers are required per City Charter and Code to obtain approval prior to placing their assets in the public right-of-way. As the public rights-of-way are a finite resource, the locations where infrastructure is to be placed, both vertical and horizontally, under and above ground need to be coordinated and reviewed to ensure the maximum use of the public right-of-way can be utilized. This workgroup is responsible for these efforts.

This workgroup provides the oversight of Public and Private Utility Applications for the City, coordinates construction of development initiated engineered projects for compliance with approved engineered plans and provides oversight of development initiated engineered plans for compliance with City of Portland construction Standards. In addition, this group coordinates the approval and review of insurance documents for those desiring to work within the public right-of-way.

This workgroup reviews and issues over 2,500 permits a year for utilities alone. These permits account for over 67,000 linear feet of pavement street cuts. These permits range from infrastructure replacements (replacing a utility pole) to major telecommunication conduit duct bank installations. The scope of review considers both the impact to our City assets (pavement and ADA corners) and to the management of placement of facilities to provide for wider access in the future. The restoration of the right of way is determined by City of Portland Standard Specifications, but also detailed by this workgroup when required.

Equity Impacts

As a Utility permitting workgroup, the workload generated through this section are industry and service driven. Applications are reviewed and permitted based on the individual utility needs to provide service throughout the City.

Changes to Program

Vertical Infrastructure is a new program with dedicated staff which will be responsible for permit review and issuance related to small cell infrastructure in the Right-of-Way (5G). While this is a new program, it is set up in a structure similar to the existing street opening program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	17,882	0	0
External Materials and Services	159,497	217,933	111,000	88,782
Internal Materials and Services	251,365	204,348	785,888	1,859,752
Personnel	1,334,654	1,769,822	2,483,112	3,521,066
Fund Expense				
Contingency	0	0	0	6,500,000
Sum:	**1,745,516**	**2,209,985**	**3,380,000**	**11,969,600**
FTE	35.83	42.5	19.58	26.58

Resources: The primary resources for this program are utility permits, environmental assessment permits and insurance/bond coordination fees.

Expenses: The primary expense for this program is personnel staff, assisting permittee with the permitting process and reviewing documents/permits.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program includes various positions.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Bureau of Transportation

Website: https://www.portlandoregon.gov/transportation

Program Contact: Alex Bejarano

Contact Phone 503-823-7575

Active Transportation & Safety

Program Description & Goals

The Active Transportation & Safety (ATS) Program works to improve safety, reduce traffic congestion, and make Portland's transportation network more efficient by increasing walking, transit, car-sharing, bicycling, and other active means of travel. ATS strategies increase access and improve public health and neighborhood livability for all Portlanders. Individual programs encourage and support active transportation (walking, transit and bicycling), help manage demand on the transportation system (Smart Trips and Transportation Wallet), and work to eliminate traffic fatalities and make streets safer (Vision Zero).

Two key measure of PBOT's success in this area are:
• "The percentage of trips made by people walking and bicycling, including transit." As residents have more, safer, reliable transportation options, as well as information and incentives, our city should witness a continued shift to alternative transportation modes. As of 2017, the latest year of the American Community Survey (ACS), 25% of Portland residents are choosing alternative ways of getting to their destinations. Through the delivery, and in some cases expansion of, PBOT's Active Transportation & Safety Program offerings, including Vision Zero, SmartTripsSafe Routes to School, Neighborhood Greenways, Sunday Parkways, and the Transportation Wallet, PBOT will look to increase this percentage and bring the City closer to its 2030 target of 70%.

• "Number of Traffic Fatalities" and "Number of Serious Injuries." Key Vision Zero performance trends are the number of people who die and are seriously injured on Portland streets each year, including by mode, age and location. City Council adopted the Vision Zero Action Plan in December 2016. The first year (2017) was a year of building a foundation – passing critical legislation and gaining significant funding; 2018 was a safer year with the number of traffic deaths trending in the right direction (35 total deaths, the lowest number since 2014).

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of trips made by people walking and bicycling, including to transit	25%	25%	27%	28%	0
Number of traffic fatalities	44	46	45	0	0
Number of Transportation Demand Management (TDM) programs offered in historically underserved areas or for underserved populations	N/A	N/A	N/A	4	0
Number of Transportation Wallets sold	N/A	N/A	N/A	0	0
Percentage of residents who commute to work by car alone	N/A	N/A	N/A	0	0
Number of automated speed cameras on High Crash Network streets	N/A	N/A	N/A	10	0
Miles of streets where speed limits were reduced to improve safety	N/A	N/A	N/A	20	0

Number of traffic related pedestrian and bicyclist serious injuries	N/A	N/A	N/A	-	0
Number of traffic crashes that result in serious injuries	N/A	N/A	N/A	-	0
Number of automated speed camera locations where more than 50% of vehicles are traveling at or below the posted speed	N/A	N/A	N/A	10	0
Rate of change in SmartTrips participants' active trips before and after participating in the program	N/A	N/A	N/A	8%	0
Number of traffic related pedestrian and bicyclist fatalities	N/A	N/A	N/A	0	0

Explanation of Services

This program includes six program areas.

• Vision Zero is Portland's initiative to eliminate traffic deaths and serious injuries on Portland streets through safe systems engineering, enforcement, and education. Program elements include lowering speed limits in strategic locations, building safety projects on High Crash Corridor roadways, and engaging community members to support behavior change and equitable street safety improvements.

• Safe Routes to School is a partnership between the City of Portland, schools, neighborhoods, community organizations and agencies to build street safety improvements and offer programs that make walking and biking accessible and safe for students and families, while easing traffic congestion around schools. The program focuses investment in and around schools with a high percentage of low-income students, students of color, and those with limited English proficiency.

• The Transportation Wallet is a strategy to reduce parking demand and traffic congestion by increasing the number of trips taken by transit, by biking and walking. Parking permit surcharge fees in Area Parking Permit Districts fund passes and vouchers for use on TriMet, Portland Streetcar, BIKETOWN, and Car2Go. The Transportation Wallet is available to people who live or work in the parking districts, and to Portlanders participating in an Affordable Housing pilot.

• Neighborhood Greenways applies traffic calming mechanisms to residential streets throughout the city, with the goal of reducing traffic speed and volumes to create a safe shared roadway environment for people walking and riding bicycles.

• SmartTrips uses individualized marketing and outreach to encourage a shift from drive-alone trips to active trips by transit, walking, or bicycling. Portlanders who move into a new home or apartment order customized packets of maps, information, and incentives that are delivered to their door.

Equity Impacts

The Active Transportation & Safety Program has deeply ingrained equity into program delivery service levels and is working to improve understanding and measurement of equitable outcomes. Several ATS programs track the participation and experience of people of color and disabilities.

• Safe Routes to Schools sought and documented extensive school-based input that included families of color to inform program development and project prioritization. On an ongoing basis, Safe Routes to School prioritizes Title 1 schools for services and capital investments. As part of this work, the ATS team gathers qualitative information through student surveys and community conversations – and due to the Title 1 prioritization, these conversations include many families of color.
• The Vision Zero Action Plan used equity as a primary lens for program development and capital project selection. Racial equity remains one of the guiding principles of the initiative. The Vision Zero Task Force sets direction for the work and includes a number of representatives from communities of color. Task Force members, community partners, and program participants of color

communities of color. Task Force members, community partners, and program participants of color have given direct input to help shape programs, messaging, and priorities.
• Sunday Parkways in 2018 held an immigrant and refugee walk with over 2,000 participants. In 2019, PBOT plans to add an additional event focused on engaging immigrants and refugees.
• The Transportation Demand Management (TDM) in Affordable Housing pilot project will provide 500 affordable housing residents with a package of free transit, Streetcar, bike share, e-scooter and car sharing services.
• The 2018 E-scooter Pilot program required scooter companies to deploy 300 e-scooters in the East Portland pattern area. PBOT conducted several focus groups with Black Portlanders, East Portlanders, and people with disabilities. PBOT collected racial and income data in its e-scooter user survey.
• In addition to the work mentioned above, ATS is putting extra emphasis on walking and wheelchair rolling for the 2019-20 season, to ensure events are inviting and accessible to all – including those who are not able to ride a bicycle.
• The Sunday Parkways program has engaged hundreds of immigrants and refugees in planning, outreach, and event participation. Safe Routes to School's prioritization of Title 1 schools for programming and capital improvements has resulted in safer conditions for low income and communities of color. The E-scooter Pilot resulted in over 40,000 scooter trips in East Portland. The TDM in Affordable Housing pilot will provide 500 residents with a suite of free transit, bike share, and car sharing service that will provide greater access to employment, grocery stores, and services.

This program supports PBOT's five-year Racial Equity Plan and other bureau equity goals related to racial and disability equity:

• Active Transportation and Safety has an equity committee that meets monthly with a defined workplan. (Objective 1.1)
• Community engagement is a part of all ATS programs, with racial equity as a defining element and objective of that engagement. (Objective 1.4)
• Safe Routes to School capital program uses race, income and limited English proficiency to prioritize investments. (Objective 1.5)
• ATS funds community partners to build capacity and participate in programs. FY 2017-18 funding included APANO, OPAL, Rosewood Initiative and Andando en Bicicletas en Cully. 2019-20 ATS programming will include funding for several additional CBOs working on racial equity. (Objective 1.7)
• ATS staff participated in a division-wide Confronting Microaggression training. A number of staff have attended other racial equity trainings and conferences. In 2019-20 the entire Active Transportation and Safety Division will participate in a division-wide training on interrupting racial aggression in the public right of way. (Objective 2.1)
• Over the past year, three out of the five ATS staff hires are women of color. The two new CSA hires are men of color. Two women of color were promoted from entry-level to more senior positions. (Objective 3.3)
• ATS uses PBOT's racial equity matrix for capital investments in general and Safe Routes/Vision Zero capital projects in particular. (Objective 4.3)
• ATS has worked closely with PBOT's Racial Equity and Inclusion Manager on program design and delivery for bike share, Safe Routes to School, Regional Travel Options, and the 2018 e-scooter pilot project. (Objective 5.7)

Changes to Program

Over the past several years, ATS has partnered with the On-Street Parking Program to develop and fund incentive programs that give people a chance to try new methods of getting around at a low (or no) cost. Funded by parking revenue, these incentives have been popular, encouraging the use of bikeshare, streetcar, carshare, and transit – and lessening the demand on limited parking spaces. In 2017 and 2018, City Council directed a portion of Recreational Cannabis Tax receipts to help fund transportation safety improvements under Vision Zero. PBOT spends these funds on safety education and infrastructure.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,195,208	1,728,817	3,571,699	2,689,716
Internal Materials and Services	244,485	445,122	449,372	140,000
Personnel	2,327,195	2,717,572	3,078,955	3,207,311
Fund Expense				
Fund Transfers - Expense	-75,000	0	0	
Sum:	**3,691,888**	**4,891,510**	**7,100,026**	**6,037,027**
FTE	26.18	28.7	29.7	27.6

Resources: This program is funded by a mix of grants, traffic fines, service charges and fees, and General Transportation Revenues (GTR). The program receives some General Fund (GF) support for Sunday Parkways, and Recreational Cannabis Tax revenue for Vision Zero safety and education projects.

Expenses: The main expenses of this program are personnel and contractor costs.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program includes 16 Transportation Demand Specialist positions and 12 coordinator, planner, and manager positions; about six of these positions provide services for other PBOT programs.

Assets and Liabilities: None.

Program Information

Bureau: Portland Bureau of Transportation

Website: www.portlandoregon.gov/transportation/

Program Contact: Catherine Ciarlo

Contact Phone 503.823.5667

Bike Share Operations

Program Description & Goals

The Bike Share Program provides convenient and inexpensive bike rentals for single-ride trips. With more than 1,000 publicly available bicycles for rent in the Central City and Portland neighborhoods, BIKETOWN helps Portland meet many of our livability, transportation, and climate change goals. It provides a low-cost transportation option to reduce congestion and carbon emissions; and it complements the MAX light rail, Portland Streetcar and bus systems.

Over the past year, PBOT engaged in a rigorous exercise to establish a new performance measure set for FY 2019-20. The purpose of this effort was to enhance transparency and provide increased insight into programmatic performance across our bureau. The measures that were defined for this program area are reflected below. Where measures are newly established, historical data is not currently present.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of BikeTown trips	N/A	N/A	N/A	0	0
Percentage change in BikeTown trips (per year)	N/A	N/A	N/A	0	0

Explanation of Services

BIKETOWN provides low-cost public bike rental in a 20 mile service area in Portland. It includes 1,000 bicycles and over 140 stations. Users may rent a bike for eight cents per minute. BIKETOWN users have completed over 700,000 trips since 2016. Local users report that 26% of BIKETOWN trips replace personal car or ride-hailing trips. BIKETOWN for All is a highly discounted program for people living on low incomes; users average 100 trips per member. Adaptive BIKETOWN is public adaptive bike rental program focused on increasing bicycle access to people with disabilities.

Equity Impacts

Adaptive BIKETOWN makes adaptive bicycles available to people with disabilities, offering handcycles, trikes, and tandems. This program continues to develop initiatives to improve access, and customer service. The BIKETOWN for All project offers discounted memberships for Portland-area residents living on low incomes; as part of the program, PBOT offers workshops on bike safety education, and free bike helmets. The Adaptive BIKETOWN project is a partnership with local businesses to offer adaptive bicycles – handcycles, trikes, and tandems – for rent in locations near multi-use trails. BIKETOWN system costs were funded by federal and state grants, and ongoing operating costs are funded by a Nike sponsorship, other sponsorships, and service charges and fee.

At launch in 2016, BIKETOWN had one of the nation's lowest ride rental costs for a single trip at $2.50 for up to 30 minutes of ride time. To increase access and to lower barriers, PBOT changed that rate to eight cents per minute. In 2018, PBOT also waived the first month rental cost for our BIKETOWN for All equity membership (Pay It Forward). BIKETOWN for All has always had a cash only option for unbanked users.

This program supports PBOT's five-year Racial Equity Plan and other bureau equity goals related to racial and disability equity:

• BIKETOWN for All partners with social service organizations that serve a higher proportion of people of color. BIKETOWN for all created Pay it Forward to make the first month free and removed the requirement to have a credit or debit card. (Plan Theme 4)

• BIKETOWN's expansion outreach will be focused on engaging communities of color and the immigrant and refugee communities. Our first focus group will be hosted by Africa House in East Portland. BIKETOWN expanded the service area in 2018 to extend to approximately SE/ NE 50th Avenue. Our expansion in 2019 will bring the service to East Portland and St. Johns. (Objective 5.7)

• BIKETOWN's contract with Lyft includes the High Road Standards, which requires all hiring to occur through a workforce training provider until 30% of employment hours are held by people of color and immigrants and refugees. Lyft's BIKETOWN office has always surpassed this goal. (Objective 5.9)

Changes to Program

The FY 2019-20 Adopted Budget directs the Portland Bureau of Transportation (PBOT) to establish a permanent program within the bureau's base budget going forward to fund the Adaptive BIKETOWN program ($50,000 for FY 2019-20). PBOT launched a pilot for Adaptive BIKETOWN in 2017 in response to the public's request for equitable access to services within the BIKETOWN program for individuals with mobility needs. The program partners with Nike and Kerr Bikes to provide accessible bikes, mobility device storage, and assistance to riders with mobility needs.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	-539,643	0	0	0
External Materials and Services	2,731,053	2,948,280	3,200,000	3,250,000
Internal Materials and Services	0	2,445	0	0
Personnel	0	27,533	0	0
Fund Expense				
Contingency	0	0	0	2,059,783
Sum:	**2,191,410**	**2,978,258**	**3,200,000**	**5,309,783**

Resources: The program is funded by sponsorships and service charges and fees. Revenue from user memberships and rental fees compose approximately one-third of the total system, with sponsorships providing the remainder.

Expenses: This program pays a contractor to operate and maintain BIKETOWN bikes and bike stations. This program has set-aside in contingency for future planned expenditures. This includes revenue for future bike share costs.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: The program does not fund any positions. Services are provided by a contractor.

Assets and Liabilities: This program is responsible for the bikeshare system, including 1,000 bikes and 143 bike stations. The bikeshare system is in fair condition.

Program Information

Bureau: Portland Bureau of Transportation

Website: www.portlandoregon.gov/transportation/

Program Contact: Steve Hoyt-McBeth

Contact Phone 503.823.7191

Tram Operations

Program Description & Goals

The Portland Aerial Tram is a 3,300 linear foot bi-cable aerial tram rising 500 feet over Interstate 5, the South Portland Neighborhood, and Terwilliger Parkway. It connects the Oregon Health & Science University (OHSU) campus on Marquam Hill to the South Waterfront District. Designed by AGPS Architecture and Garaventa AG, the tram has been integral to the expansion of OHSU and the development of the South Waterfront District.

The tram is located entirely within the public right-of-way (SW Gibbs Street) and is owned by the City of Portland. OHSU oversees operations and has contracted with Doppelmayr USA to operate and maintain the tram on a daily basis.

The goal for managing the tram components is that 95% of the tram system will be in fair or better condition. Currently, PBOT is exceeding that goal, as 100% of the tramway and related structures are in good condition.

Another goal is to minimize the time during which the tram is not operable. There are instances when the tram must be shut down to maintain the safety of the passengers, generally due to weather or other unforeseen events. Maintenance to the tram is usually conducted during the hours it is closed for business. PBOT exceeded its service target in the past year, as the tram was inoperable less than 1% of the time during operating hours. For FY 2019-20, this program has not yet identified the right performance measures. This will be developed in FY 2019-20 in time for budget development for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Portland Aerial Tram efficiently moves riders between Marquam Hill and South Waterfront, allowing OHSU to meet increased patient, education, and research needs. It also is a popular tourist attraction, offering visitors spectacular views of the City and, on clear days, the snow-capped mountains of the Cascades.

The Portland Aerial Tram provides reliable and predictable transportation option by providing safe and consistent operating services for commuters. The tram efficiently removes traffic from city streets, avoiding an estimated two million vehicle miles annually. The tram saves an estimated 93,000 gallons of gas annually and reduces greenhouse emissions by more than 1,000 tons. The Portland Aerial Tram is part of the Cities public transportation system which is overseen by the Tram Executive Management Committee comprising of City and OHSU staff in addition to a member from the public. The tram is managed seamlessly with Tri-Met and Portland StreetCar. The tram communicates with the public via website and social media outlets.
In addition, the Portland Aerial Tram hosts about ten family friendly events per year to invite the community to experience the tram and welcome them to the OHSU campus.

Equity Impacts

As a transit provider, we strive to meet the need needs of our customers and work collaboratively with Portland StreetCar and TriMet on Title II reasonable accommodation requests and Title VI Civil Rights compliance.

Changes to Program

• Ridership continues to increase creating capacity issues during peak times that could create the need for longer operating hours. The tram has an extensive maintenance and inspection schedule. This work can have large budget impacts and an inconsistent demand for recourses.
• All resources needed to support core expenses come from fare revenue. City staff continually analyze maintenance schedules and adjust annual operation budgets and reserve account contributions to verify the City has the resources to meet the needs of operating the tram.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	107,584	73,833	266,186	222,920
Internal Materials and Services	79,820	67,831	68,230	71,207
Personnel	58,023	55,146	40,584	80,873
Sum:	**245,427**	**196,810**	**375,000**	**375,000**
FTE	0	0	0.25	0.25

Resources: Revenues to operate the tram come from fare revenues and OHSU.

Expenses: Per contract, the operating expenses are split between the two entities based on public ridership vs. ridership related to OHSU.

Historical expense and FTE figures may show large discrepancies due to recent changes in the bureau's program structure in response to the City's transition to program offer budgeting.

Staffing: OHSU contracts out the day to day operations to Doppelmayr USA. The program has a manager (supervisor II) who spend a quarter of the time managing the contractual obligations with OHSU and Doppelmayr.

Assets and Liabilities: Lower and Upper tram stations, intermediate tower, and all tramway equipment.

Program Information

Bureau: Portland Bureau of Transportation
Website: https://www.portlandoregon.gov/transportation
Program Contact: Rich Eisenhauser
Contact Phone 503-823-6108

CITY OF PORTLAND, OREGON
1851

Management Services

Program Description & Goals

Management Services is the Auditor's executive office, providing leadership, accountability, and administrative and business support for all activities of the office. These shared functions include business operations and communications, legal counsel, administrative support, and policy/data analysis. The City Elections Officer and the lobbyist and political consultant registration programs also are in Management Services. The division acts as liaison for responsibilities that need Citywide coordination and is the Auditor's Office contact point for other offices throughout the City government.

The purpose of the division is to support the Auditor's responsibilities for accountability, transparency and independence throughout the office's operations. In FY 2018-19, the division has focused on implementation of administrative rules, business operations, and legal counsel services following a recent Charter amendment. It plans to launch independent budgeting processes in FY 2019-20. In coordination with the office's Diversity and Equity Committee, the division assists with implementation, tracking, and reporting on division goals in the office's five-year racial equity plan.

A dashboard of Auditor's Office performance measures, including additional detail and trends for each measure, are available from the "About Us" section of the Auditor's web page.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

Management Services helps implement the Auditor's priorities and ensures that each division provides consistent and timely services to the public and other City offices. Services include business operations, project management, legal counsel, communications, and administrative support.

The Elections Officer provides procedural information and determines whether candidates and initiatives are eligible for the ballot. Lobbyists and political consultants also must register and report activity to Management Services.

Management Services provides support to the Auditor's Advisory Council, a group of volunteers who meet quarterly to advise the Auditor on issues related to the office. Members represent a broad swath of Portlanders in terms of age, background and expertise. Auditor's Advisory Council members are listed on the Auditor's website.

Equity Impacts

Management Services coordinates and supports progress on the office's five-year racial equity plan. Staff strategizes with divisions to align equity goals with strategic or work plans and provides technical assistant to streamline collection of demographic data, develop partnerships, integrate an equity lens and evaluate progress. All divisions are implementing plans related to the office's overall goals, which were developed in conjunction with the Auditor, management, staff, and the Diversity and Equity Committee.

Management Service's division equity plan includes tracking applicant pools across the office and analyzing data to determine if there are disparities in worker retention, evaluation, and discipline. Other goals include improving community access to and understanding of Auditor's Office services by reaching out to populations that have been historically underrepresented or are less frequent users of the Auditor's Office. A dashboard of progress on these and other equity goals will be published on the Auditor's Office website for public review.

The division's Title II Americans with Disabilities Act and Title VI Civil Rights Act liaison assists with periodic review of vital documents requiring translation as well as acting as the recipient of public complaints about access, accommodation, and compliance.

Changes to Program

Management Services' responsibilities increased in 2017 with a Charter amendment that made the Auditor's Office administratively independent from City officials and bureaus. The amendment authorized new decision-making powers for the Auditor's Office related budget, human resources, procurement, legal services, and administrative rule-making. In FY2018-19, a vacant position in Audit Services was realigned to create a Business Operations Manager position to lead Management Services. The division developed and implemented policies, procedures, and administrative rules to implement the new Charter powers.

The Business Operations Manager implemented an Auditor's directive to decentralize budget planning and expenditure tracking to division managers to enable them to align resources with strategic goals and equity plans. Management Services developed granular budgets for each division and helps managers make effective spending decisions.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	115,085	65,345	152,687	229,000
Internal Materials and Services	347,166	640,400	342,009	237,351
Personnel	649,405	899,460	1,157,853	1,130,663
Sum:	**1,111,656**	**1,605,206**	**1,652,549**	**1,597,014**
FTE	5.5	6.5	8	8

Resources: This program is funded through the City's General Fund; revenues are split between discretionary and overhead and total approximately $1.6 million

Expenses: The division has stable and predictable spending related to Personnel and Internal Materials and Services.

External Materials and Services spending is more variable. Use of these funds are tied to the Auditor's priorities and strategic plans for professional development for managers, consulting services, special projects, and other officewide services and materials.

Staffing: Management Services has 7.5 full-time-equivalent employees who support the Auditor and seven divisions.

No changes to staffing are forecasted for Management Services.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of the City Auditor	**Program Contact:**	Joshua McNeal IV
Website:	www.portlandoregon.gov/auditor/64816	**Contact Phone**	503-823-3610

Audit Services

Program Description & Goals

The mission of the Audit Services division is to promote equitable, efficient, effective, and fully accountable City government. To accomplish this mission the division conducts independent audits in accordance with Government Auditing Standards to provide objective information and recommendations to City elected officials, managers, and the public.

In FY 2017-18, the cost per audit hour was $145. This increase over prior years is attributed to two employees on extended leave. In FY 2018-19 the division's staffing stabilized and the cost per audit hour is anticipated to decrease to $130.

In FY 2017-18 the division issued 10 reports, below the goal of 12. This is attributed to employees on extended leave and the promotion of an auditor to the division director's position

In FY 2017-18, City management implemented, or was in the process of implementing, 85 percent of audit recommendations, an increase from the prior year's implementation rate of 81 percent.

A dashboard of Auditor's Office performance measures, including additional detail and trends for each measure, are available from the "About Us" section of the Auditor's web page.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

Portland's form of government and Charter mandate accountability in the form of an elected auditor. Charter and Code specify that the Auditor shall conduct and coordinate audits according to Government Auditing Standards. In addition to conducting performance audits, staff also manages a contract with an accounting firm to audit the City's financial statements and manages a fraud hotline.

A performance audit is an independent examination of the how the government is operating. Auditors assess evidence against objective criteria to develop recommendations for improvement. Performance audits can introduce new perspectives, tools, and approaches to deal with challenges. Objective assessments of performance may prompt a new course of action, recognize achievements, and identify areas for improvement.

Performance audits benefit the City by increasing the transparency of City operations and spending improved performance when recommendations are implemented. Beginning in January 2019, Audit Services will report publicly on implementation of recommendations.

The division undergoes peer review for quality control every three years, a process which helps ensure its work is conducted in accordance with professional standards. The Audit Services division successfully passed reviews beginning in 1993 and its next review is scheduled for 2020.

Equity Impacts

The Audit Services division added steps to the audit process to evaluate the impact of City services on all residents and any disparate impacts on communities of color.

First, the division is soliciting audit topic ideas online, attending public meetings to listen to community concerns, and expanding community outreach with the intent to prioritize audit topics that matter to the community.

Second, early in each project auditors brainstorm potential equity impacts to determine whether the program being audited adversely affects vulnerable communities, whether the bureau tracks and is addressing those disparities, and who in the community should be consulted during audit fieldwork. In many cases data is not readily available to identify disparate impacts. In that case, auditors consider whether additional audit fieldwork is needed to assess potential disparities.

Finally, in each audit, the division is working to reach out to community members impacted by the program. Auditors do this through interviews, surveys, and outreach to community groups.

Increasing the effectiveness of equity analysis is a priority for FY 2019-20.

Changes to Program

An auditor was promoted to Director of Audit Services and an administrative support position was realigned to the Management Services Division to create a Business Operations Manager. Management Services now provides administrative support and report production services to Audit Services through a shared-services model that benefits all divisions.

Also new this year is the transfer of management of the City Auditor's Fraud Hotline from the City Ombudsman to Audit Services. The City Auditor's Fraud Hotline gives employees and community members a way to anonymously report fraud, waste, or misuse of City resources.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	435,944	464,633	639,159	740,112
Internal Materials and Services	184,759	212,140	293,172	258,503
Personnel	1,383,676	1,402,112	1,531,041	1,566,361
Sum:	**2,004,379**	**2,078,885**	**2,463,372**	**2,564,976**
FTE	11.2	11.8	10.9	

Resources: This program is funded through the City's General Fund; revenues are split between discretionary and overhead and total approximately $2.5 million.

Expenses: The division has stable and predictable spending related to Personnel and Internal Materials and Services.

External Materials and Services spending varies. Most of these funds pay for services provided by an accounting firm to audit the City's financial statements. The remaining funds (approximately $100,000) pay for annual training required by Government Auditing Standards and technical expertise. Spending on consultants varies based on the annual audit schedule developed by the City Auditor. In FY 2018-19, Audit Services used an outside firm to conduct an audit of the City's data security controls and plans to contract for a construction audit of payment controls for the Portland Building renovation.

Staffing:

The division includes nine full time auditors and one director. All auditors meet continuing professional education requirements, and many have professional certifications, including Certified Internal Auditor, Certified Government Auditing Professional, and Chartered Accountant. All auditors are members of the Association of Local Government Auditors.

Division staffing decreased by two full-time positions in the last five years. One auditor position was realigned to create a Deputy City Ombudsman position. An administrative support position was realigned to create the Business Operations Manager in position in Management Services.

Creating an entry-level auditor position to replace the capacity lost remains a priority for the division.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of the City Auditor	**Program Contact:**	Kari Guy
Website:	www.portlandoregon.gov/auditor/auditservices	**Contact Phone**	503-823-3544

Council Clerk/Contracts

Program Description & Goals

The Council Clerk/Contracts Division provides administrative support to City Council and the public by preparing weekly agendas, recording meeting minutes, and maintaining objective documentation of City Council business. The division also reviews every City contract to ensure they have been properly authorized and updates City Charter and Code based on Council action.

The goal for posting Council meeting minutes is three months from the date of a meeting, but limited staffing has contributed to a backlog. The Auditor has taken steps to streamline operations by delegating non-Council related tasks, such as vendor and payroll payments, to other City bureaus. Once the transfer of duties is completed, Council Clerk will have additional capacity to ensure minutes are publicly available in a timely manner.

A dashboard of Auditor's Office performance measures, including additional detail and trends for each measure, are available from the "About Us" section of the Auditor's web page.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

Council Clerk/Contracts is mandated by Charter. The division develops, facilitates, and maintains accurate and objective documentation of City Council business. As the administrator of Council sessions, Council Clerk staff prepares the agenda, processes ordinances and resolutions, compiles official minutes, and provides easy access to Council proceedings. Staff also produces the official versions of City Charter and Code, gives final approval of contracts, and disburses City payments.

Equity Impacts

Council Clerk/Contracts adopted an equity plan to improve access to the Council process, particularly for traditionally underrepresented communities. The first step will be to determine which communities are underrepresented in the current system and work with those communities to identify strategies to overcome barriers to access. The division will:

• Create a brochure or other literature in multiple languages describing the Council process, agenda and communications opportunities and work with neighborhood offices to distribute this information in underserved neighborhoods;
• Identify communities that have not participated in the Council process to raise awareness with targeted outreach; and
• Identify ways to engage youth about Portland government through partnerships with schools, youth groups, and other community organizations.

Council meetings are broadcast with closed-captioning to provide access to hearing-impaired community members.

Changes to Program

Council Clerk/Contracts is collaborating with the Office of Management and Finance on a pilot to test an electronic agenda-filing process. As part of the pilot, Archives and Records Management, a separate division of the Auditor's Office, is exploring options to use the City's electronic records management system to facilitate a fully electronic process.

The Auditor has undertaken steps to delegate payment responsibility for vendor and payroll checks from the Council Clerk to the Accounting Division and Payroll in the Office of Management and Finance. By delegating these legacy tasks to related operations in Management and Finance, more time will be devoted to core Council Clerk functions, such as clearing a backlog of Council meeting minutes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	58,669	56,081	71,980	84,050
Internal Materials and Services	118,048	127,476	136,867	135,555
Personnel	663,765	701,284	717,294	664,499
Sum:	**840,482**	**884,840**	**926,141**	**884,104**
FTE	6.5	6.5	6	6

Resources: This program is funded through the City's General Fund; revenues are split between discretionary and overhead and total approximately $886,000.

Expenses: The division has stable and predictable spending related to Personnel and Internal Materials and Services. External Material and Services spending is variable. A portion pays for closed-captioning of Council meetings and work sessions, costs that vary depending on the length of meetings. Increased captioning costs of nearly $10,000 is attributable to meeting length, protests that interrupt meetings, and technical delays.

Staffing: Current staffing is 6.5 full-time-equivalent employees. The division is made up of a Supervisor 1, Analyst 1, Clerk to the City Council, Assistant Council Clerk (Administrative Specialist II), Office Support Specialists II and III, and a half-time Administrative Specialist II.

A half-time position was realigned to Management Services two years ago to provide communications services through a shared-services model. While Council Clerk/Contracts is rebalancing workload with the Office of Management and Finance, more expedient services would be provided if staffing returned to eight full-time employees.

Assets and Liabilities: N/A

Program Information

Bureau: Office of the City Auditor

Website: www.portlandoregon.gov/auditor/Councilclerk

Program Contact: Toni Anderson

Contact Phone 503-823-4022

Archives & Records Management

Program Description & Goals

The mission of Archives & Records Management is to ensure an open and accountable government through public records, which supports the Auditor's mission to promote transparency and accountability. The division accomplishes this through records policies, training, managing the Archives & Records Center, and administering the City's electronic records management and retention system, known as TRIM.

In FY 2017-18, division staff assisted 826 researchers and estimate that number for FY 2018-19. Public and employee demand for access to historical records is difficult to anticipate.

Use of the public portal for accessing City business and historical records continues to increase. That is an indicator of the division's success in providing a centralized repository for City records. The goal for FY 2018-19 was 90,000 visits and the estimate is approximately 95,000 visits by the end of the fiscal year. The target for FY 2019-20 will be 100,000 visits.

A dashboard of Auditor's Office performance measures, including additional detail and trends for each measure, are available from the "About Us" section of the Auditor's web page.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

All City records must be maintained in accordance with public records laws, and the City Charter gives the Auditor responsibility for maintaining all official records. Archives & Records Management provides Citywide services for records management and retention, administration of the electronic records management system, and archives.

The City's records are critical to the operations of the City and they document how the City fulfills its public responsibilities. Archives and Records Management provides records retention and management training to ensure employees meet their legal responsibilities and encourage access to greater number of records for the public. The City's archival records represent the deep history of city policies, projects, and operations, but also continue to serve as valuable business records for bureaus.

The community's interests in government archives are diverse. They range from documenting property history influencing current development to identifying actions that impact a community. While the City's archives are bureaucratic records, they also contain rich social history of the communities of Portland.

The division targets outreach to underserved communities so they know the resources available to them and serves as a clearinghouse to help guide people to the information they need. Staff uses its deep and broad knowledge of City government to connect employees and the public to needed information.

Equity Impacts

Community access, engagement, and partnerships are the primary tenets of the Auditor's Office equity plan. Archives and Records Management's contribution to the plan is (1) documenting current communities that use services and identifying gaps in service with the goal of improving engagement with underserved communities; (2) determining records that reflect communities of color and other traditionally underserved communities and making them more available through focused digitization and database functionality; and (3) partnering with City bureaus to help them fulfill their own equity goals through public records access. Each goal will be tracked to create baseline data from which to grow and adapt outreach and engagement.

Changes to Program

As interest in public records increases, more City employees and community members are accessing TRIM and E-Files (the public portal to TRIM). Assisting with public records requests and research continues at a level that is often impacted by the public's interest in City activities and by current bureau projects. The division is also engaged in partnerships and initiatives to build public awareness of City information resources in underrepresented communities. Recent efforts include workshops held at neighborhood libraries on finding City records and partnerships with community groups and the Multnomah County Library to promote related events, conversations, and exhibits.

Archives and Records Management is working with Technology Services to launch an email management pilot with employees from around the City. If successful, it may result in Citywide adoption. City offices continue to request assistance with electronic records management and implementing TRIM in their bureaus. Most implementation requires analysis of bureau record-keeping practices.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	126,614	109,027	181,841	229,541
Internal Materials and Services	1,621,956	1,573,706	1,561,050	1,520,670
Personnel	813,610	842,896	841,760	887,659
Sum:	**2,562,180**	**2,525,629**	**2,584,651**	**2,637,870**
FTE	7	7	7	7

Resources: This program is funded through the City's General Fund; revenues are split between discretionary and overhead and total approximately $2.6 million.

Expenses: The division has stable and predictable spending related to Personnel and Internal Materials and Services. Rent and debt service for the Portland Archives and Records Center accounts for most of the expenditures, followed by costs associated with the enterprise server for TRIM. External Materials and Services spending varies. Spending is mostly focused on outreach and events connected to the division's workplan and equity goals, fixed TRIM license maintenance costs, staff training and education, materials and equipment for Portland Archives and Records Center operations, and contracted professional services.

In FY 2019-20, the division is expected to implement the new software system CORE (Capture, Organize, and Retain Email). It's a technical solution for managing email that reduces the burden for City employees yet meets legal records retention requirements. Archives and Records Management is partnering with Technology Services to pilot CORE to a group of City employees. If the pilot is successful, the division will work to implement CORE City-wide.

Staffing: Archives and Records Management is made up of seven full-time-equivalent employees whose focus is managing, preserving, and making accessible public records according to local, state, and federal laws and to professional standards. In addition to having the educational degree requirements established by the Society of American Archivists, most employees are certified through the Association of Certified Archivists. A number of student and part-time casual workers assist staff with projects associated with Archives and Records Center operations.

Creating an additional staff position to keep up with bureau demands for electronic records management assistance is a future priority.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of the City Auditor	**Program Contact:**	Diana Banning
Website:	www.portlandoregon.gov/auditor/archives	**Contact Phone**	503-865-4110

Hearings Office

Program Description & Goals

City Council authorizes administrative appeals in City Code to create value for both the public and the City through increased transparency and accountability. A cost-effective venue for disputes to be aired reduces the need for them to be litigated in court or the media, which are alternatives that often reinforce perceptions that government cannot be trusted to treat people fairly.

The City Hearings Office improves trust in government by providing an impartial venue in which disputes can be aired and decided by an independent legal officer. It often is the only avenue for residents or property owners to contest a City action that affects them. Decisions rendered by Hearings Officers may also point out areas that need City Council or management attention.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

The Hearings Office conducts impartial hearings and renders decisions in land use, Code enforcement, and appeals of City actions, including vehicle tows and other administrative matters. Orders issued by the Hearings Office can be appealed to a variety of jurisdictions, including the Oregon Land Use Board of Appeals, Multnomah County Circuit Court, and City Council.

The Hearings Office provides space sufficient for participants to present their cases and for the public to observe. The venue is outfitted with sound and audio-visual equipment. Hearings are supported by a clerk, who helps the Hearings Officer and participants submit and organize evidence and ensures the proceedings are recorded.

Equity Impacts

In 2015, the Auditor's Office persuaded City Council to require bureaus to inform people of their rights to appeal and prohibit inconsistent and sometimes exorbitant fees to be charged for a hearing. Council's action opened the Hearings Office to people who otherwise could not afford the fees some bureaus charged to access an impartial appeals process. The legislation made the Hearings Office the central location for filing hearings requests and allowed no more than a nominal fee to request a hearing. The Hearings Office currently charges no fee.

The next step for the Hearings Office to improve equity in services is to collect demographic information from community members who access the Office's services and identify barriers to access. Plans currently are underway to determine an appropriate data collection process.

Public access to file a request for a hearing will improve when an electronic case management system, which allows community members to file requests and documents online, is implemented in 2019. This will increase accessibility to the appeals process because community members will be able to file their requests and view filed documents at their convenience 24-hours a day.

Changes to Program

The number and types of Code enforcement and appeals cases has increased and broadened steadily over the last few years. The caseload is affected by changes in City policy, practice, regional land use trends, and the public's interest in pursuing appeals. Those variables make it challenging to predict future caseloads and staffing levels.

In Fiscal Year 2017-18, the Hearings Office processed 439 cases, which was consistent with the prior year. The caseload estimate for FY 2019-20 is 600.

Throughout its history, leadership of the Hearings Office has been noted for its long tenure in City service. The Hearings Office, however, experienced turnover in the top position in the past three years. A permanent position was filled for the Chief Hearings Officer in March of 2019 after being held by an interim position for several months.

This uncharacteristic turnover has exposed the City and appellants to consequences that may occur when decisions are delayed. That is especially true for land use cases in which state law requires that decisions be rendered in 17 calendar days. We are requesting additional resources equivalent to a half-time Hearings Officer to mitigate these risks and stabilize available staffing.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	47,837	94,191	179,873	123,094
Internal Materials and Services	176,813	210,128	112,084	135,791
Personnel	394,924	398,844	438,517	521,943
Sum:	**619,574**	**703,164**	**730,474**	**780,828**
FTE	3.5	3.9	3.9	3.9

Resources:

The Hearings Office is funded through a combination of discretionary and overhead revenue from the General Fund, interagency agreements with specific bureaus, and revenue from an intergovernmental agreement, totaling approximately $765,000. A quarter of the total budget is made up of interagency revenues from the Portland Police Bureau, Portland Bureau of Transportation, and Bureau of Development Services. These Bureaus are the most frequent users of the Hearings Office, primarily for vehicle tow appeals and land use cases.

A small portion of revenues are generated from an intergovernmental agreement with Multnomah County to hear adult care home licensing cases, which usually occur less than 10 times per year. These cases generate approximately $5,000 in budgeted revenue from Multnomah County. The Hearings Office is reviewing its current agreement with Multnomah County, which has not been updated since the 1990s. The licensing cases have become more complex and take more time for hearings and the preparation of written decisions.

Expenses: Personnel and internal services spending are stable for this division. External Materials and Services spending mostly pays for contract Hearings Officers, who help respond to the variable nature of the workload. They primarily hear land-use cases and cases in which the staff Hearings Officers have recused themselves.

Turnover in the Chief Hearings Officer position increased demand for external services provided by the contract hearings officers and contributed to overspending for professional services. The complexity of some cases has also increased costs for their services. The trend is likely to continue until a permanent Chief is recruited and oriented into the position.

Staffing: The Hearings Office has 3.5 full-time equivalent employees, consisting of a Chief Hearings Officer, a half-time Hearings Officer, and two Hearings Clerks.

Finding the right mix of City employees and contracted Hearings Officers has been an ongoing challenge given the unpredictable nature of the caseload. Historically, staffing decisions have been based strictly on historical trends in caseloads and projections. This approach ignores the management responsibilities required of the Chief Hearings Officer, which were formally included in a recently updated class specification. It also makes no room for the part-time Hearings Officer to engage in non-case-related tasks that would benefit the City, such as helping implement strategies to achieve equity goals and contributing comprehensive legal research to support all Hearings Officers.

Additional on-going funds to increase the existing half-time Hearings Officer position to full-time remains a future priority and would enable the City to cover the estimated increased caseload, reduce the risk that cases would not be heard or decided timely, and deepen the bench of experienced Hearings Officers who can step in when turnover occurs. It would also provide capacity to contribute to a more efficient, effective, and equitable office.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of the City Auditor	**Program Contact:**	Adelia Hwang
Website:	www.portlandoregon.gov/auditor/hearings	**Contact Phone**	503-823-7334

Independent Police Review

Program Description & Goals

Independent Police Review (IPR) is an impartial oversight agency under the authority of the independently elected City Auditor. IPR was created to improve police accountability, promote higher standards of police services, and increase public confidence. IPR receives complaints, conducts investigations, reviews and participates in ongoing police administrative investigations, and monitors and reports on complaint status.

IPR received 415 complaints from community members in 2018, which follows trends from recent years.

One of IPR's main functions is serving as the intake point for community member complaints. IPR's goal is to complete intake investigations within 21 days. On average, IPR staff took 25 days to complete intake investigations in 2018, down from 33 days in 2017. This decrease is due to an increase in investigative staff and the introduction of a process for referring complaints that seem to be best resolved by management intervention rather than disciplinary action to Police Bureau supervisors for further investigation.

IPR's goal for completing full administrative investigations is 60 days. Although IPR investigators only met this goal in 25% of 2018's cases, the median number of days required was 84 days, down from 95.5 days in 2017.

A dashboard of Auditor's Office performance measures, including additional detail and trends for each measure, are available from the "About Us" section of the Auditor's web page.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

Independent Police Review is the sole City agency authorized to accept complaints about Portland Police Bureau sworn members. It independently investigates allegations of misconduct, provides system reviews of police bureau policies, and initiates its own administrative investigations.

A U.S. Justice Department investigation found in 2012 that Portland Police Bureau used excessive force against individuals experiencing mental illness. In 2014, the City negotiated a settlement with the Department of Justice that called for sweeping changes to the way Portland's police accountability system operates. The settlement agreement calls for IPR to have the ability to conduct independent investigations of alleged officer misconduct. Additionally, Oregon revamped its anti-police profiling statue (HB 2002 passed in 2015). Both federal and state requirements led IPR to expand its investigative resources to include allegations involving high ranking Police Bureau officers, allegations of bias, and street protests. IPR has increased the number of investigations it conducts, from none in 2012 to 20 in 2017.

IPR centers its outreach program on reaching historically marginalized communities, such as communities of color, recent immigrants, and people experiencing homelessness. Recent outreach efforts have focused on communities that are underrepresented in IPR's complaint data.

IPR is using its policy review and recommendation function to emphasize equity, such as the recent review of the Police Bureau's equitable hiring goals. The Police Bureau agreed to several IPR recommendation on how it can better track the Bureau's progress in recruiting diverse candidates.

Equity Impacts

IPR's serves a critical function in meeting the City's equity goals. IPR's accountability function disproportionately serves historically marginalized communities. African Americans are 7 percent of Portland's population but account for 20 percent of IPR's complaints. Additionally, a significant percentage of IPR complaints come from community members who live in East Portland, an area the City has historically struggled to provide adequate services.

IPR's outreach efforts are aimed at communities where institutional or cultural barriers inhibit reporting of alleged officer misconduct. For example, our data shows the Latino community and recent immigrants file complaints at lower levels than other members of the community. IPR conducts outreach events in underserved communities in partnership with community stakeholders to hear community concerns about police accountability.

Changes to Program

In FY 2018-19, IPR filled two newly authorized positions which added to the divisions capacity to conduct administrative investigations of alleged officer misconduct. A complaint investigator hired in May 2018 has allowed IPR to conduct timelier intake and full administrative investigations. The fully staffed IPR investigator team, under the guidance of a Lead Investigator, has coordinated complaint intake while ensuring that full administrative investigations progress in a timely and efficient manner.

The Management Analyst position has allowed IPR to conduct regular policy reviews and make recommendations to the Police Bureau. The division expects the new capacity to allow for continued improvements to its accountability database and enhanced public reporting through interactive dashboards. The analyst will also help track implementation of the division's strategic plan and revise administrative rules as needed.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	65,963	113,628	126,145	164,981
Internal Materials and Services	210,222	266,366	303,031	327,125
Personnel	1,468,201	1,684,316	1,987,910	2,118,511
Sum:	**1,744,386**	**2,064,310**	**2,417,086**	**2,610,617**
FTE	13.5	14.5	16	16

Resources: This program is funded through the City's General Fund; revenues are fully discretionary and total approximately $2.6 million.

Expenses: The division has stable and predictable spending related to Personnel and Internal Materials and Services. External Materials and Services spending is used for staff education and training, professional expertise needed for reviews of officer involved shootings and in-custody deaths, translation and interpretation services, and other special projects. There also will be a joint expense with the Police Bureau to purchase a new complaint and accountability database, which will allow the City to better meet its reporting requirements under the Department of Justice settlement agreement.

Staffing: IPR has 16 full-time-equivalent employees. There are eight investigators, two analysts, one outreach coordinator, and two administrative support staff. Management consists of a division director and two supervisors. In early FY 2019-20, the office expects to complete a competitive recruitment for a new IPR Director.

Assets and Liabilities: N/A

Program Information

Bureau: Office of the City Auditor

Website: www.portlandoregon.gov/auditor/ipr

Program Contact: Constantin Severe

Contact Phone 503-823-2815

Ombudsman's Office

Program Description & Goals

The Ombudsman's Office is an independent advocate for a fair, equitable, and just City government. In response to complaints from the public about City services, the Ombudsman conducts impartial investigations and resolves problems informally. If a complaint is substantiated, the Ombudsman will work with the complainant and the bureau to find a fair and equitable solution and may advocate for improvements to policies or procedures.

Requests for assistance from the Ombudsman have increased steadily for each year. There were more than 600 requests in calendar year 2018. A key goal for calendar year 2018 was for bureaus to accept at least 75 percent of the Ombudsman's recommendations; the actual acceptance rate was 100 percent. The Ombudsman increased the acceptance goal for calendar year 2019 to 85 percent.

A dashboard of Auditor's Office performance measures, including additional detail and trends for each measure, are available from the "About Us" section of the Auditor's web page.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

The Ombudsman's Office is uniquely situated to independently and impartially review complaints from community members who feel wronged by City government. Even the best functioning bureaucracy will sometimes make mistakes, treat people unfairly, or simply reach the wrong decision. The Ombudsman's role is to help correct those errors, seek redress for people who have been treated unjustly, and improve trust in City government. The option of having an independent third party assess complaints is of particular importance in a commission form of government, where legislators also serve as administrative leaders.

The Ombudsman is meant to complement – not replace or duplicate – traditional modes of resolving differences between the public and City agencies. Distinguishing features of the Ombudsman's Office include:

• The Ombudsman is independent from the bureaus it investigates and is responsible only to the elected City Auditor and the public interest;
• The Ombudsman does not represent the complainant or the bureaus; rather, the Ombudsman is a neutral intermediary and advocate for good government;
• The Ombudsman conducts thorough, apolitical investigations of City bureau administrative acts and recommends appropriate changes; and
• As the central repository for complaints, the Ombudsman is positioned to discern complaint trends, observe any patterns of administrative unfairness, and approach problem-solving from a Citywide perspective.

The Ombudsman's Office is staffed by two full-time employees. To make the most of its limited resources, the Ombudsman prioritizes complaints where there is a potential for the highest impact. This means the Ombudsman often takes on difficult, complex issues where the potential for an unjust result is acute, that suggest a systemic problem, or involve an important principle of good government.

The community seeks out the Ombudsman as a last resort. The Ombudsman's resolution of a complaint can determine whether they remain in their home, keep the water from being shut off, or stay in business. The stakes are also high for the employees and bureaus against whom complaints are made. No small part of the Ombudsman's job is to absolve and support City staff where complaints are unfounded.

Equity Impacts

The Ombudsman includes equity as part of the administrative fairness analysis for individual complaint investigations and builds equity into recommendations to bureaus. The Ombudsman is also piloting a systemic review project that assesses the equity-related impacts of a specific City program that has been the subject of many complaints over the years.

The Ombudsman developed a division-specific racial equity plan that includes tracking disaggregated quantitative data about complainant racial/ethnic heritage. Demographic data collection began in calendar year 2019. The Ombudsman will analyze this data beginning in 2020 to ensure that services are equitably rendered.

The Ombudsman is also developing a strategic communications and outreach plan that will use data and qualitative interviews about how communities of color and other historically disenfranchised communities access and experience services. The Ombudsman will use this information to target outreach so that services are accessible to all Portlanders.

Changes to Program

Demand for the Ombudsman's services has seen significant increases over the last several years, likely because of increased community awareness of the Ombudsman's Office. Nevertheless, the Ombudsman recognizes that many Portlanders who could benefit from services do not know about the Ombudsman function. To ensure that the Ombudsman is accessible to all Portlanders, the Ombudsman is developing a strategic communications and outreach plan that will be implemented in calendar year 2019.

In late 2015, the Auditor reallocated resources to double the investigative capacity of the Ombudsman's Office by adding a Deputy Ombudsman position. The Office remains at two full-time employees and is the smallest program in the Auditor's Office.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	15,339	13,705	17,390	27,294
Internal Materials and Services	35,069	33,893	41,755	43,953
Personnel	305,167	297,137	297,348	320,785
Sum:	**355,575**	**344,735**	**356,493**	**392,032**
FTE	2	2	2	2

Resources: This program is funded through the City's General Fund; revenues are split between discretionary and overhead and total approximately $390,000.

Expenses: The Ombudsman has stable and predictable spending related to Personnel and Internal Materials and Services.

External Materials and Services spending is used for the Ombudsman's priorities for professional development, public awareness of and access to services, and occasional special projects. The program is expected to increase spending on targeted outreach and strategic communications.

Staffing: From 2012 through most of 2015, the Ombudsman's Office was staffed by the Ombudsman and part-time administrative assistant. The Ombudsman's Office currently has two full time employees: an Ombudsman and a Deputy Ombudsman. Staff responsibilities include intake of the public's complaints; investigation or facilitation; recommendations for resolution of individual complaints; and resulting system reviews and policy recommendations to City management and legislative bodies. The Ombudsman is also responsible for program administration, performance management, budgeting, and strategic planning.

No staffing changes are forecasted for the near future; however, additional staff capacity is needed so that the Ombudsman can conduct adequate outreach and undertake additional systemic reviews.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of the City Auditor	**Program Contact:**	Margie Sollinger
Website:	www.portlandoregon.gov/ipr	**Contact Phone**	503-823-4503

Mayor's Office

Program Description & Goals

The Mayor's Office is charged with legislative and administrative responsibilities in accordance with the provisions of the City of Portland Charter. The Mayor is one of five nonpartisan City Council members. As a whole, the City Council promotes a livable and sustainable city by enacting and enforcing City laws, approving a budget, and advocating for policy changes and funding at the state and federal levels.

Specifically, the Mayor's Office provides leadership and management oversight for the following portfolio of City bureaus/offices:
- Portland Police Bureau
- Portland Housing Bureau
- Bureau of Planning & Sustainability
- Proper Portland
- Bureau of Development Services
- City Budget Office
- City Attorney
- Government Relations
- Office of Management & Finance
- Office of Community Technology

The Mayor's Office does not have any performance measures however the bureaus they manage have numerous performance measures which are one component of measuring success. Elected officials serve four-year terms and ultimately the voters decide at the ballot whether the Mayor should serve another term if they seek reelection.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

In addition to the providing leadership and management oversight to the bureaus listed above, the Mayor's Office has the following liaison responsibilities:

- Travel Portland
- Regional Disaster Preparedness Organization – Policy Committee (with Commissioner Hardesty)
- Home Forward
- A Home for Everyone (with Commissioner Eudaly)
- Visitor Development Fund Board (VDF Board)
- Local Public Safety Coordinating Council (with Commissioner Hardesty)
- Mt. Hood Cable Regulatory Commission
- Portland Community Media
- Human Rights Commission (with Commissioner Fritz)
- League of Oregon Cities (with Commissioner Fritz)
- Portland Children's Levy
- Royal Rosarians
- Portland Commission on Disability (with Commissioner Fritz)

Equity Impacts

The Office of Equity and Human Rights (OEHR) presented Racial Equity Goals and Strategies to City Council on July 8, 2015. The City Council unanimously adopted the goals and strategies as binding City Policy, providing a guidepost for City employees and leadership to follow, to achieve the racial equity goals.

The Mayor's Office implements these racial equity goals and strategies in a variety of ways. Promoting equity and inclusion, both within the Mayor's Office and through the Mayor's policy agenda. The Mayor's Office has a diverse staff, and the Office relies upon that diversity in lived experiences to best serve Portland. The Mayor's Office applies an equity lens to all its efforts and decisions. The Office also heavily relies on data from its bureaus to make policy decisions and ensure that the City makes progress on its equity goals. Additionally, the Mayor's Office reaches out into the community and works with other institutions and community groups to collaborate and receive input.

Changes to Program

During FY 2018-19, the Mayor's Office realigned resources and made changes to its communications team. This included adding video production and editing expertise and resources in an effort to more effectively provide information to the public.

The Summerworks Program has also been transferred from the Mayor's Office to the Bureau of Human Resources.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	699,398	219,696	354,076	213,914
Internal Materials and Services	501,917	860,193	879,701	819,305
Personnel	1,679,564	2,125,022	2,300,020	2,595,292
Sum:	**2,880,879**	**3,204,911**	**3,533,797**	**3,628,511**
FTE	17	19	19	19

Resources: The Mayor's Office receives a General Fund Overhead and Discretionary target allocation each year from the City Budget Office. The target may be adjusted annually for items such as cost-of-living adjustments, PERS rates, and inflation.

Expenses: The primary expense for the Office is staffing. Personnel costs make up over 70% of the budget. Internal and External Materials and Services to support the personnel are also included within each Council Office. The Mayor's Office budget previously contained the funding for the Summerworks Program, which now resides in the Bureau of Human Resources. The SummerWorks Program is a publicly funded paid summer internship program for diverse young adults ages 16-24 in the Portland Metro area. The purpose of program is to train potential interns to be work ready and then connect them to job coaches that will help them access the paid internships during the summer months.

Staffing: The Mayor's Office has 22.0 FTE, one of which is partially paid out of the COCL/PCEEP Special Appropriation and two paid out of the Office of Youth Violence. Since the positions are budgeted within those sections, the total FTE for the Mayor's Office displays as 19.0. The biggest change to staffing over the past several years has been the creation of the new Senior Commissioner Staff Representative classification. This new classification, along with the associated funding, has created the flexibility for Office to retain higher compensated staff members that might otherwise find other employment inside or outside the City.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of the Mayor	**Program Contact:**	Kristin Dennis
Website:	https://www.portlandoregon.gov/wheeler/	**Contact Phone**	503-823-4045

Commissioner of Public Affairs

Program Description & Goals

The Commissioner of Public Affairs is charged with legislative and administrative responsibilities in accordance with the provisions of the City of Portland Charter. The Commissioner is one of five nonpartisan City Council members. As a whole, the City Council promotes a livable and sustainable city by enacting and enforcing City laws, approving a budget, and advocating for policy changes and funding at the state and federal levels.

Specifically, the Commissioner of Public Affairs provides leadership and management oversight for the following portfolio of City bureaus:
• Portland Fire & Rescue
• Portland Bureau of Emergency Management
• Bureau of Emergency Communications
• Fire & Police Disability & Retirement

The Commissioner of Public Affairs does not have any performance measures however the bureaus they manage have numerous performance measures which are one component of measuring success. Elected officials serve four-year terms and ultimately the voters decide at the ballot whether the Commissioner should serve another term if they seek reelection.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

In addition to the providing leadership and management oversight to the bureaus listed above, the Commissioner of Public Affairs has the following liaison responsibilities:

• BOEC User Board
• Local Public Safety Coordinating Council (with Mayor Wheeler)
• Regional Disaster Preparedness Organization – Policy Committee (with Mayor Wheeler)
• Fair & Moral Claims Committee

Equity Impacts

The Office of Equity and Human Rights (OEHR) presented Racial Equity Goals and Strategies to City Council on July 8, 2015. The City Council unanimously adopted the goals and strategies as binding City Policy, providing a guidepost for City employees and leadership to follow, to achieve the racial equity goals.

The Office supports programs that advance equity by:
• Supporting equity in recruitment and hiring activities
• Promoting training and career development activities for all employees
• Reviewing City and public policy through an equity lens
• Challenging policies that provide disproportionate impacts to communities of color and low-income communities

Changes to Program

• On November 6th, 2018, Portland voters elected Jo Ann Hardesty to fill the seat of retiring Commissioner Dan Saltzman. Jo Ann is the first woman of color to ever serve of the Portland City Council. Commissioner Hardesty was sworn in on January 2nd, 2019.

• Prior to the retirement of Commissioner Saltzman, the Gateway Center for Domestic Violence and the Children's Levy were moved out of the Commissioner's Office. The Children's Levy is now a stand-alone fund that is managed by the Mayor's Office. The Gateway Center for Domestic Violence was moved to Multnomah County effective January 1st, 2019.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	11,507	8,141	97,835	8,724
Internal Materials and Services	200,434	291,557	209,003	279,596
Personnel	854,816	850,568	805,033	1,015,954
Sum:	**1,066,757**	**1,150,266**	**1,111,871**	**1,304,274**
FTE			8	8

Resources: The Commissioner of Public Affairs receives a General Fund Overhead and Discretionary target allocation each year from the City Budget Office. The target may be adjusted annually for items such as cost-of-living adjustments, PERS rates, and inflation.

Expenses: The primary expense for the Office is staffing. Personnel costs make up nearly 80% of the budget. Internal and External Materials and Services to support the personnel are also included within each Council Office.

Staffing: The Commissioner's Office has 8.0 FTE. The biggest change to staffing over the past several years has been the creation of the new Senior Commissioner Staff Representative classification. This new classification, along with the associated funding, has created the flexibility for Office to retain higher compensated staff members that might otherwise find other employment inside or outside the City.

Assets and Liabilities: N/A

Program Information

Bureau:	Commissioner of Public Affairs	**Program Contact:**	Karly Edwards
Website:	https://www.portlandoregon.gov/hardesty/	**Contact Phone**	503-823-8402

Commissioner of Public Safety

Program Description & Goals

The Commissioner of Public Safety is charged with legislative and administrative responsibilities in accordance with the provisions of the City of Portland Charter. The Commissioner is one of five nonpartisan City Council members. As a whole, the City Council promotes a livable and sustainable city by enacting and enforcing City laws, approving a budget, and advocating for policy changes and funding at the state and federal levels.

Specifically, the Commissioner's Office provides leadership and management oversight for the following portfolio of City bureaus/offices:
• Office of Community & Civic Life
• Portland Bureau of Transportation

The Commissioner's Office does not have any performance measures however the bureaus they manage have numerous performance measures which are one component of measuring success. Elected officials serve four-year terms and ultimately the voters decide at the ballot whether the Commissioner should serve another term if they seek reelection.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

In addition to the providing leadership and management oversight to the bureaus listed above, the Commissioner of Public Safety has the following liaison responsibilities:

• A Home for Everyone (with Mayor Wheeler)
• East Portland Action Plan
• Regional Arts & Culture Council
• Portland'5 Centers for the Arts
• Public Involvement Advisory Committee
• New Portlanders Policy Council
• Metro Policy Advisory Committee (MPAC)
• Multnomah County Animal Control
• Multnomah Youth Commission
• Portland Streetcar, Inc.
• Portland Mall Management, Inc.
• Portland Aerial Tram Board
• Joint Policy Advisory Committee on Transportation (JPACT)

Equity Impacts

The Office of Equity and Human Rights (OEHR) presented Racial Equity Goals and Strategies to City Council on July 8, 2015. The City Council unanimously adopted the goals and strategies as binding City Policy, providing a guidepost for City employees and leadership to follow, to achieve the racial equity goals.

Below are the Citywide Racial Equity Goals and Strategies along with examples of how Commissioner's Office meets these goals:

1. Use a racial equity framework: The Commissioner's office uses a racial equity framework to inform all its policy analysis and development work.
2. Build organizational capacity: The Commissioner's office seeks to help community-based organizations build leadership skills and secure resources.
3. Implement a racial equity lens: The Commissioner's office utilizes a racial equity lens to inform all its policy analysis and development work.
4. Be data driven: The Commissioner's office utilizes data to inform all its policy analysis and development work.
5. Partner with other institutions and communities: The Commissioner's office partners with dozens of community institutions and groups.
6. Operate with urgency and accountability: The Commissioner's office is reminded daily that it is directly accountable to Portlanders.

Changes to Program

In FY 2019-20, direct oversight of the East Portland Action Plan (EPAP) is being moved from the Office of Community & Civic Life to the Commissioner of Public Safety. EPAP is an ongoing group charged to provide leadership and guidance to implement the East Portland Action Plan, a guide for improving livability in outer East Portland, as adopted by the Portland City Council in February 2009 and the Multnomah County Commission in July 2010.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	45,792	66,178	86,069	25,309
Internal Materials and Services	183,926	282,689	202,274	209,126
Personnel	763,565	820,360	932,680	994,839
Sum:	**993,283**	**1,169,227**	**1,221,023**	**1,229,274**
FTE	8	8	8	9

Resources: The Commissioner's Office receives a General Fund Overhead and Discretionary target allocation each year from the City Budget Office. The target may be adjusted annually for items such as cost-of-living adjustments, PERS rates, and inflation.

Expenses: The primary expense for the Office is staffing. Personnel costs make up 80% of the budget. Internal and External Materials and Services to support the personnel are also included within each Council Office.

Staffing:	The Commissioner of Public Safety has 8.0 FTE for the Office. 1.0 additional FTE will be transferred from Civic Life into the Commissioner's Office to work on the EPAP, with the budget for the position residing within Special Appropriations.
Assets and Liabilities:	N/A

Program Information

Bureau:	Commissioner of Public Safety	**Program Contact:**	Marshall Runkel
Website:	https://www.portlandoregon.gov/eudaly/	**Contact Phone**	503-823-3062

Commissioner of Public Utilities

Program Description & Goals

The Commissioner of Public Utilities is charged with legislative and administrative responsibilities in accordance with the provisions of the City of Portland Charter. The Commissioner is one of five nonpartisan City Council members. As a whole, the City Council promotes a livable and sustainable city by enacting and enforcing City laws, approving a budget, and advocating for policy changes and funding at the state and federal levels.

Specifically, the Commissioner of Public Utilities provides leadership and management oversight for the following portfolio of City offices/bureaus:
• Portland Water Bureau
• Bureau of Hydroelectric Power
• Office of Equity and Human Rights

The Commissioner of Public Utilities does not have any performance measures however the bureaus she manages have multiple performance measures which are one component of measuring success. Elected officials serve four-year terms and ultimately the voters decide at the ballot whether the Commissioner should serve another term if they seek reelection.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

In addition to providing leadership and management oversight to the bureaus listed above, the Commissioner of Public Utilities has the following liaison responsibilities:

• The League of Oregon Cities
• Metro Policy Advisory Committee (MPAC)
• Fair & Moral Claims Committee
• Portland Utility Board (PUB)
• Human Rights Commission (with Mayor Wheeler)
• Visitor Development Fund Board (VDF Board)
• Rose Festival Foundation
• Portland Commission on Disability (with Mayor Wheeler)

Equity Impacts

The Office of Equity and Human Rights (OEHR) presented Racial Equity Goals and Strategies to City Council on July 8, 2015. The City Council unanimously adopted the goals and strategies as binding City Policy, providing a guidepost for City employees and leadership to follow, to achieve the racial equity goals.

Below are the Citywide Racial Equity Goals and Strategies along with examples of how the Commissioner of Public Utilities meets these goals:

1. Use a racial equity framework: Commissioner Fritz co-founded the Office of Equity and Human Rights in 2011 and is once again its Commissioner in Charge. In partnership with the Office of Equity and bureau-based Equity Managers, she strives to ensure all decisions are made with respect for equity in City jobs, contracts, and services for people of color and people experiencing disabilities. She authored the City's historic Tribal Sovereignty Recognition Resolution in 2012, which led to the creation of the City Tribal Relations Director position. The Portland Water Bureau is consulting the Tribal Relations Director as decisions are made regarding the filtration plant, land swap in the Bull Run watershed, Mt. Tabor Park signage, and other projects.
2. Build organizational capacity: Through the Office of Equity, Commissioner Fritz oversees citywide equity training and monitoring of bureau progress on expanding opportunities within the workforce via the Citywide Racial Equity Goals and Strategies and the ADA Transition Plan, and in the community via bureau services and the Community Opportunities and Enhancements Plan. Within her office, she hires, supports and promotes people who embrace the City's equity work. Everyone in her office is responsible for achieving equity goals as a core competency.
3. Implement a racial equity lens: Commissioner Fritz worked with the Office of Equity and the City Budget Office to redesign the Budget Equity tools, including these questions. All but one of her office staff identify as members of underrepresented communities, bring a broad range of life experiences to every aspect of the team's work.
4. Be data driven: Commissioner Fritz requires her bureaus to provide annual updates of data on hiring, retention and promotion of people of color and people experiencing disabilities. She tracks progress on implementation of the ADA Transition Plan work items.
5. Partner with other institutions and communities: Commissioner Fritz is liaison to the Human Rights Commission, the Portland Commission on Disability, the Portland Utility Board, the Regional Water Consortium, the Visitor Development Fund Board, the Metro Policy Advisory Committee, and the League of Oregon Cities. She attends many community events, particularly those supporting immigrant and refugee communities.
6. Operate with urgency and accountability: The Office of the Commissioner of Public Utilities strives to respond to all communications within 24 hours, with a maximum of one week. While issues can't always be resolved in that timeframe, at a minimum confirmation of receipt is given. Commissioner Fritz responds to emails from community members personally.

Changes to Program

• In December 2016, Council adopted the Open and Accountable Elections Fund which created a matching funds program for qualifying candidates. The Elections Fund management is assigned to the Commissioner of Public Utilities and will remain with this office until the end of 2020.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	12,530	10,814	40,308	69,045
Internal Materials and Services	179,221	271,947	214,743	198,374
Personnel	743,981	852,093	912,571	981,856
Sum:	**935,732**	**1,134,853**	**1,167,622**	**1,249,275**
FTE		8	8	

Resources: The Commissioner of Public Utilities receives a General Fund Overhead and Discretionary target allocation each year from the City Budget Office. The target may be adjusted annually for items such as cost-of-living adjustments, PERS rates, and inflation.

Expenses: The primary expense for the Office is staffing. Personnel costs make up 80% of the budget. Internal and External Materials and Services to support the personnel are also included within each Council Office.

Staffing: The Commissioner of Public Utilities has 10.0 FTE, 2 of which are housed in the Commissioner's office and paid out of the Open and Accountable Elections fund. The biggest change to staffing over the past several years has been the creation of the new Senior Commissioner Staff Representative classification. This new classification, along with the associated funding, has created the flexibility for the Commissioner of Public Utilities to retain higher compensated staff members that might otherwise find other employment inside or outside the City.

Assets and Liabilities: NA

Program Information

Bureau: Commissioner of Public Utilities

Website: http://www.portlandonline.com/fritz/?c=49157&

Program Contact: Tim Crail

Contact Phone 503-823-3988

Commissioner of Public Works

Program Description & Goals

The Commissioner of Public Works is charged with legislative, administrative, and quasi-judicial responsibilities in accordance with the provisions of the City of Portland Charter. The Commissioner is one of five nonpartisan City Council members. As a whole, the City Council promotes a livable, equitable, and sustainable city by enacting and enforcing City laws, approving a budget, and advocating for policy changes and funding at the state and federal levels.

Specifically, the Commissioner of Public Works provides leadership and management oversight for the following portfolio of City bureaus:

- Bureau of Environmental Services
- Portland Parks & Recreation

Council offices do not have performance measures. The bureaus they manage have numerous performance measures, which are one component of measuring the office's success.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

In addition to providing leadership and management oversight to the bureaus listed above, the Commissioner of Public Works has the following liaison responsibilities:

- Office of Film & Video
- Venture Portland
- Metropolitan Exposition and Recreation Commissioner (MERC)
- Elders in Action
- Portland Utility Board (PUB)
- Portland Parks Foundation
- Portland Parks Board
- Pioneer Courthouse Square

Equity Impacts

As an at-large, nonpartisan elected official, the Commissioner of Public Works represents all Portlanders and seeks input from our community's many diverse voices before making decisions on policy, budget, or quasi-judicial matters.

The office prioritizes relationships with faith and immigrant/refugee communities, bringing their perspective to bear on policy and budget decisions. Additionally, the office's liaison work with older adults and the small business community ensures that their voices are heard and considered in City decision-making. In its administrative role, the office directs its bureaus to prioritize equity in their work and decisions and promotes training and career opportunities for all employees.

Finally, the office advocates for transparency in City operations, allowing the community to understand what's happening and why – and to hold government accountable.

Changes to Program

In FY 2018-19, the Commissioner of Public Works entered into a Customized Training and Educational Services contract with Portland State University. This contract provides the Commissioner's Office with a limited-term Public Service Fellow.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	6,707	13,712	60,028	49,327
Internal Materials and Services	173,314	257,549	207,170	195,750
Personnel	781,154	907,527	918,860	984,197
Sum:	**961,175**	**1,178,789**	**1,186,058**	**1,229,274**
FTE	8.9	9	9	9

Resources: The Commissioner of Public Works receives a General Fund Overhead and Discretionary target allocation each year from the City Budget Office. The target may be adjusted annually for items such as cost-of-living adjustments, PERS rates, and inflation.

Expenses: The primary expense for the Office is staffing. Personnel costs make up 80% of the budget. Internal and External Materials and Services to support the personnel are also included within each Council Office.

Staffing: The Commissioner of Public Works has 9.0 FTE, although the FY 2019-20 budget has funding for 8.0 filled positions. The biggest change to staffing over the past several years has been the creation of the new Senior Commissioner Staff Representative classification, which has allowed Council offices to competitively recruit and retain staff.

Assets and Liabilities: N/A

Program Information

Bureau: Commissioner of Public Works

Website: https://www.portlandoregon.gov/fish/47686

Program Contact: Sonia Schmanski

Contact Phone 503-823-3592

CITY OF PORTLAND, OREGON
1851

Legal Services

Program Description & Goals

The City Attorney's Office performs all legal work for the City, with a few exceptions. The office represents the City and its elected officials, employees, bureaus, offices, boards, and commissions in court, administrative matters, and other proceedings. The program provides legal advice and training to help the City identify risks and create good laws and policies.

Good legal advice helps avoid risk, including litigation, but there is no way to measure the lawsuits the City avoided. However, the success of the Program is shown by the low cost of service, $164 versus $376 per hour for outside counsel, and a 90% success rate in litigation.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of litigation cases	1,580	1,481	1,600	1,300	1,300
Number of contracts reviewed and approved	9,938	11,432	10,500	11,000	10,000
Number of training hours provided by City Attorney staff to other City staff	468	394	400	400	450
Annual costs of outside counsel	$508,718	$490,695	$575,000	$500,000	$500,000
Cost of service per attorney hour	$138	$141	$150	$164	$164
Percentage of cases favorably resolved	90%	97%	85%	90%	90%

Explanation of Services

Legal Services is an essential program that provides excellent, objective, timely and cost-effective legal advice and advocacy in support of the City's policy goals and ensures that the official actions of the City, its elected officials and employees comply with the law. This essential work includes defending the City in court, initiating legal actions when appropriate, negotiating and reviewing contracts, reviewing policies and programs, providing legal advice and counsel, and performing any other legal services needed.

Legal obligations are created by the City Code and Charter, state statutes, regulations, administrative requirements, and federal law. In addition, the Oregon State Bar establishes ethical professional requirements that govern lawyers and the work performed for the City and City officials. City attorneys work with clients to provide solutions-oriented legal services to help achieve City policy objectives. Clients are encouraged to involve the City Attorney's Office at early levels of decision making, even if a significant legal issue has not yet been identified.

Attorneys and staff in the office provide a wide variety of legal services. Office staff draft and review local legislation, contracts, real estate leases, intergovernmental agreements and other legal documents, and negotiate on behalf of the City. The Program also provides preventive legal services, including training for City staff on a broad spectrum of legal topics which can help reduce risk and prevent serious problems before they arise. Finally, attorneys evaluate cases to determine how best to protect the City's interests and represent the City in court. Because almost all litigation is handled in-house, the office can try cases in a cost-effective manner. The office is effectively achieving this goal, with 90% of its cases resolved favorably to the City.

The Legal Services Program has a positive impact on the City. By providing good legal advice, the City Attorney’s Office helps ensure that the City complies with the law and avoids litigation. This helps reduce costs to the City and also ensures that the City is acting lawfully towards all Portlanders.

Equity Impacts

Advancing equity is an explicit goal of the City Attorney’s Office. Office attorneys provide legal advice to all City bureaus to help advance the City’s policy objective of achieving equity in all of its programs, services and activities. Internally, the office encourages employees to devote up to two hours per month of work time to equity trainings. This helps attorneys and staff use an informed equity lens when conducting the City’s legal work. Further, the office runs an Honors Attorney Program aimed at training new lawyers interested in public service who come from historically underserved communities. In developing budget constraints, the office protected these investments in advancing equity by maintaining them in the base budget. However, the office’s small administrative staff was reduced in FY 2016-17. As a result, the office’s capacity to track data has been diminished which makes it difficult to effectively evaluate progress toward equity goals.

Changes to Program

The demand for Legal Services across the City continues to rise. The office is required to review more and more contracts every year, and the office faces increasing demands related to public records. Also, the office has taken on more affirmative litigation matters for the City, including tax collection efforts, challenges to the legality of certain federal government's policies, opioid legislation and litigation against Monsanto for effects of PCBs.

To keep up with demand, in FY 2018-19, the office added three limited term legal support positions to assist with contract reviews and tax collection matters. These three positions have been converted to ongoing in FY 2019-20 and will maintain the office's capacity to manage increased contract review and collections work. Appropriate staffing levels will help reduce contract review turnaround times and increase capacity for revenue collections. The budget also includes 1.0 FTE to support public records requests and 1.0 FTE to continue providing legal services to the Police Bureau.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	665,995	362,101	416,038	816,797
Internal Materials and Services	1,149,867	1,495,630	1,148,190	1,125,095
Personnel	10,045,088	10,378,878	11,648,835	12,611,564
Sum:	**11,860,950**	**12,236,609**	**13,213,063**	**14,553,456**
FTE	66.3	67.6	70.6	71.6

Resources: The FY 2019-20 Adopted Budget for Legal Services is $14.6 million. Interagency agreements with other bureaus for specialized legal work represent half of the total operating resources of the office. The remainder is supported by General Fund discretionary and overhead revenue.

Expenses: Personnel services represent 87% of the office's expenditures. Internal services, such as rent and technology services, make up 8%. The remaining 5% is for external services such as office supplies, software, legal research services, and continuing legal education.

Staffing: The office has 41 lawyers and 31 support professionals. The office is led by the City Attorney who is appointed by the City Council. The Adopted Budget includes converting four limited term positions to ongoing to handle increased workloads in collections, contracts and public safety work and one additional position to support public records work. The office has recently experienced higher employee turnover due to retirements and lawyers leaving the City to take higher paying positions elsewhere. To remain competitive and attract and retain the best legal professionals to the City, the office should keep its salary and benefits levels consistent with other public sector legal offices.

Assets and Liabilities: The office's legal practice management and knowledgebase software system is its only physical asset.

Program Information

Bureau:	Office of the City Attorney	**Program Contact:**	Crystine Jividen
Website:	https://www.portlandoregon.gov/attorney/	**Contact Phone**	(503) 823-4047

Federal Relations

Program Description & Goals

The Federal Relations Program leads the development and advancement of the City's legislative and regulatory priorities with Congress and administrative agencies in Washington, DC. Federal Relations is also responsible for maintaining positive working relationships with the congressional district offices, and national organizations representing the interests of cities. Lobbying efforts include appropriation and grant funding opportunities, affirmative regulatory and statutory policy improvements and defending against efforts to limit or preempt local authority. In furtherance of the Office's Racial Equity Plan, the Federal Relations Program advocates for issues of importance to underserved communities including increasing resources for programs that address housing capacity and homelessness: the HOME Partnerships Investment Program ($1.4 billion, with $4.13 million coming to Portland), the Community Development Block Grant program ($3.3 billion, with $8.59 million coming to Portland), the Emergency Solutions Grants ($270.0 million, and $701,174 coming to Portland), the Tenant-Based Rental Assistance Program ($20.29 billion, $71.1 million coming to Portland), and the Low Income Housing Tax Credit (12.5% increasing for four years and permanent authorization of income averaging).

Important performance measures for the Federal Relations Program are outreach to the congressional delegation; feedback from the Office's annual customer service survey on responsiveness, progress on issues and overall performance; and setting a robust legislative and regulatory agenda. Successful federal legislative and regulatory advocacy relies on having strong relationships with key members of Congress and staff, lead agency staff and a network of other cities and national organizations to amplify shared-urban issues on the national stage.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Respondents Rating Government Relations either Very Responsive or Responsive	100%	98%	97%	100%	100%
Percentage of respondents rating services as excellent or very good	97%	86%	95%	95%	95%
Percentage of respondents reporting progress made on state, federal, or intergovernment issues	75%	97%	90%	75%	75%

Explanation of Services

The City of Portland does not operate in a vacuum and shares constituents with many other levels of government: regional, state, federal, tribal and international. At the Federal level, Congress and the Administration direct significant funding to state and local governments, set national policy impacting everything from environmental protections to fair housing standards, and occasionally act to preempt local control (e.g., 5G infrastructure and autonomous vehicles). In order to both protect City priorities and advance a robust policy agenda, the Federal Relations Program is tasked with lobbying Congress and executive agencies. Every year, the Federal Relations Program works with Council and Bureaus to vet, develop and approve a comprehensive agenda. Recent federal lobbying activities have resulted in the following benefits to the City and Portlanders:
Leading coordination of West Coast cities via the West Coast Alliance of Mayors to gain national attention on homelessness, livability and substance abuse issues impacting urban communities;
Increased funding for housing and homeless services (see Program Description & Goals for specific figures);
Maintaining Urban Area Security Initiative funding for regional preparedness efforts related to natural disasters and terrorism threats ($2.5 million in 2018);
Positioning the City of Portland and the region for a potential significant infrastructure bill and the opportunity to elevate projects for congressionally directed spending;
and Pursuing Department of Justice grants related to victims' assistance programs ($824,831) and community policing initiatives ($779,565). The Federal Relations Program consists of one FTE located in Portland, Oregon and a contract for representation in Washington, D.C. The Program Manager travels between four and five times each year (to Washington, D.C. and to conferences) to advocate on behalf of the City. The Program coordinates daily with client offices and bureaus to meet the needs of their federal policy goals, and to address ad hoc political issues as they arise. The Program regularly communicates to client offices and bureaus about what federal actions mean to the City, and provides the City's congressional delegation with Portland-specific impacts to show the result of federal policies. The Program also conducts outreach to national advocacy organizations and other cities across the country on shared federal priorities

Equity Impacts

This past year, OGR incorporated explicit direction in the legislative and regulatory agenda building process for client offices and bureaus to apply an equity lens when considering and submitting ideas for potential inclusion in the City's federal agenda. As part of the federal agenda development and preparation, the Federal Relations Program conducts specific outreach to key partner cities along the West Coast to align priorities and reflect the needs of underserved communities. The Bureau's Racial Equity Plan specifically directs the Office to advance issues impacting underserved communities (see recent examples of federal items provided in sections above). Additionally, the Federal Relations Program is coordinating regularly with the newly formed Tribal Relations Program to include matters of importance to Tribes and the urban Indian community into the federal agenda, including tribal sovereignty and Missing and Murdered Indigenous Women.

Changes to Program

Changes due to external factors:
There has been an increased need to provide regular information to client offices and city bureaus about the impact of actions by the Administration. Otherwise, Program demands remain the same.
Changes to resources:
The Mayor's Office has requested all City bureaus reduce their operating budgets by 1% in the FY 2019-20 Budget. The 1% reduction cumulatively comes from local travel, international gifts, education and professional development, and office supplies and operations. The reduction to office supplies and operations may hinder the smooth operation of day-to-day work. Additionally, the importance of highly skilled employees is paramount to the work of representing the City to outward interests, which may be impacted by fewer opportunities for professional development.
Changes to Organizational Structure:
Staffing and resource allocations to the Federal Relations Program remain the same.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	215,765
Internal Materials and Services	0	0	0	35,944
Personnel	0	0	0	264,777
Sum:	**0**	**0**	**0**	**516,486**
FTE	0	0	0	1.6

Resources: OGR operates from General Fund and interagency agreements between other City bureaus.

Expenses: The expenditures for OGR, including the Federal Relations Program, are generally personnel, travel and operating expense. The Federal Relations Program also includes a contract for lobbying in Washington, DC.

Staffing: Currently, under the organizational structure, Government Relations has 10 fulltime staff (FTE). The Federal Relations Program has one FTE with a contract for lobbying in Washington, DC. One-fifth of the administrative and management staffing budget is also allocated to the Federal Relations Program.

Assets and Liabilities: None

Program Information

Bureau: Office of Government Relations

Website: https://www.portlandoregon.gov/ogr/47296

Program Contact: Nils Tillstrom

Contact Phone 503-823-3227

International Relations

Program Description & Goals

The International Relations Program helps to build strategic and intergovernmental relationships to identify and promote international partnerships and exchanges that advance the policy goals and objectives of the City of Portland. The International Relations Program also manages the City's work with Portland's nine sister cities and one friendship city, including direct engagement with foreign governments and the local presidents of the non-profit sister and friendship city associations. The Program develops and ensures adherence to international and diplomatic protocol by interfacing with Portland's local international network and diplomatic community. Annually, the Program welcomes over 70 delegations to Portland from around the world while ensuring that cultural protocol standards are followed and supports strategically important outbound international missions.

Important performance measures for the International Relations Program include the number of delegations welcomed, and feedback from the Office's annual customer service survey on responsiveness, overall performance, and progress on issues that align with the City's policy priorities and support Portland's sister city relationships. Successful international relations for the City of Portland relies on strong relationships with Portland's international and diplomatic community, foreign affairs offices in key partner cities, leadership for sister and friendship city organizations, client offices and bureaus.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Respondents Rating Government Relations either Very Responsive or Responsive	100%	98%	97%	100%	100%
Percentage of respondents rating services as excellent or very good	97%	86%	95%	95%	95%
International delegations received	94	86	70	70	70
Percentage of respondents reporting progress made on state, federal, or intergovernment issues	75%	97%	90%	75%	75%

Explanation of Services

The City of Portland does not operate in a vacuum and shares constituents with many other levels of government: regional, state, federal, tribal and international. The International Relations Program consists of one FTE located in Portland, Oregon. Through the International Relations Program, the City is able to seize the opportunity of sharing and scaling Portland progressive policies on a global level from cities and communities around the world that are interested in learning about, and from, Portland. Every year, the City receives hundreds of requests from around the world to visit, partner, learn, deepen ties, and travel. The International Relations Program helps field, vet and accommodate these many requests and continuously engages with key partners and stakeholders that work to elevate Portland's international stature. Additionally, the Program works closely with our clients and Portland's nine sister city and one friendship city associations. These associations are non-profit entities with authentic, community-based ties to their affiliated cities. The International Relations Program acts as the official city conduit with and for those associations and any requests they or their affiliated city may have. Recent examples of significant International Relations work include, but are not limited to:
Coordinating a 30+ person mayoral delegation to Suzhou, China in celebration of the 30th anniversary of the sister city relationship and in furtherance of educational, economic, cultural and diplomatic ties between the Portland and Suzhou;
Hosting the President of Micronesia in Portland City Hall to show the Mayor's support of the creation of The Federated States of Micronesia's first official consular office on the continental United States;
Welcoming a high-level business delegation from China led by the Vice Governor of Jiangsu Province (the second largest contributor to China's GDP) and facilitating meetings between local companies around environmental protection;
Securing rose beds in recognition of Portland's sister city relationships at the Washington Park Rose Test Garden and identifying opportunities for Portland Parks & Recreation and the garden curator to share their knowledge abroad;
Creating opportunities to share global best practices, including a US-UK Community Leader exchange directed at violence prevention and building resilience through community policing and other initiatives;
Extending an invitation to have Prosper Portland's Commissioner attend the Urban 20 Mayors Summit in Buenos Aires and represent Portland with 29 other cities in endorsing an official communication that prioritizes the urban perspective in tackling climate change;
Serving as the City of Portland's representative on Greater Portland Inc's annual Best Practices Mission Trip to Colombia on social urbanism and active transportation;
and Providing a timely response after an earthquake hit Japan in September and working with local representatives, the Portland-Sapporo Sister City Association and the City of Sapporo to publicly express the Mayor's support and the City's plans to assist.

Additionally, the International Relations Program works closely with the City Auditor's office to ensure compliance with protocols and appropriate preservation of international gifts. The Program also periodically meets with local residents or groups interested in establishing new sister city relationships or joining an existing one, and supports efforts led by key partners such as the Japanese Garden, WorldOregon, Oregon Consular Corps, the U.S. Commercial Service Office in Portland, Travel Portland and more.

Equity Impacts

The International Relations Program facilitates meetings between bureaus and visiting international delegations to share best practices around policy areas, through an equity lens. To promote the City's efforts around community engagement, as well as learn from other cities, the International Relations Program collaborates with the New Portlanders Program and the Office of Equity & Human Rights, among others, to share insights with visiting government delegations.

Portland's Sister City Associations are all volunteer-run non-profit organizations with a limited amount of resources. The International Relations Program works with the associations to identify solutions and opportunities that advance their efforts and promote exposure. The annual Sister City Reception hosted by the Mayor is an occasion that brings together Portland's Sister City Associations, City representatives, local international partners and official delegations from sister cities to highlight the important milestones and the work they do. In 2018, the Program partnered with the International Youth Silent Film Festival to further elevate the event and encourage future collaboration.

The Program also looks to actively build the pipeline for future international policymakers through outreach, informational interviews and job shadows. The Office has also used translation services and continues to budget for such expenses, as they arise. Unfortunately, due to the loss of the International Relations Associate, the ability of the program to field the same volume of requests has been diminished. This puts a strain on the Program's capacity to engage at the same level and potentially has negative impacts on groups with historical and generational roots within Portland, such as our sister city associations and international community-based organizations that send in requests.

Changes to Program

Changes due to external factors:

The ability to address increased demand is directly tied to staff resources, which is currently only one FTE after budget cuts last fiscal year. The current political climate has also raised inquiries and resulted in community members expressing concerns related to the City's international engagement around community resiliency and public safety.

Changes to resources:

The Mayor's Office has requested all City bureaus reduce their operating budgets by 1% in the FY 2019-20 Budget. The 1% reduction cumulatively comes from local travel, international gifts, education and professional development, and office supplies and operations. Fewer funds for international relations gifts may impact the City's ability to create a positive impression with visiting governmental delegations. Other reductions to office supplies and operations may hinder the smooth operation of day-to-day work. Additionally, the importance of highly skilled employees is paramount to the work of representing the City to outward interests, which may be impacted by fewer opportunities for professional development.

Changes to Organizational Structure:

Last budget cycle, the International Relations Program lost one FTE, shrinking the program in half. This change resulted in a significant increase in workload for the remaining FTE, especially as it pertains to responding to requests for information, services, space and other opportunities from external partners, foreign governments and the sister city and friendship city associations. Without the adequate assistance to prepare for high level meetings or events, it becomes more difficult for the Program to follow protocol and complete necessary tasks.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	21,014
Internal Materials and Services	0	0	0	35,915
Personnel	0	0	0	214,695
Sum:	**0**	**0**	**0**	**271,624**
FTE	0	0	0	1.6

Resources: OGR operates from General Fund and interagency agreements between other City bureaus.

Expenses: The expenditures for OGR are generally personnel, travel and operating expenses. The International Relations Program also covers the City's Sister Cities International membership dues and purchases approximately 50 top tier gifts for high level delegates, as appropriate for protocol.

Staffing: Currently, under the organizational structure, Government Relations has ten fulltime staff (FTE). The International Relations Program has one FTE. One-fifth of the administrative and management staffing budget is also allocated to the International Relations Program.

Assets and Liabilities: None

Program Information

Bureau: Office of Government Relations

Website: https://www.portlandoregon.gov/ogr/65019

Program Contact: Chido Dhliwayo

Contact Phone 503-823-5139

Regional Relations Program

Program Description & Goals

The Regional Relations Program will coordinate regional government relations for the City and conduct high-level outreach to surrounding regional governments to advance the City's strategic position. The Program will also work closely with other programs in the Office on multijurisdictional projects, and with the Mayor's Office, Commissioners, Auditor and bureau directors, and other governmental officials.
The Regional Relations Program was created in the last budget cycle (FY 2018-19). Due to classification complications outside of the Office's control, the Program hired its first FTE this January. Updates to the Bureau's Racial Equity Plan and Strategic Plan are scheduled for this summer and will include development of specific measurable goals for equity outcomes and other performance measures related to outreach, advancement of issues and more.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

The City of Portland does not operate in a vacuum and shares constituents with many other levels of government: regional, state, federal, tribal and international. At the Regional level, overlapping jurisdictions with shared constituents compete and collaborate for resources, prioritization with superior levels of government, and policies that impact the region and beyond. Traditionally, the City of Portland has approached regional engagement in a decentralized manner without consistent communication between bureaus and elected officials on the myriad of projects and priorities the City is looking to advance. The role of the Regional Program is to strategically deepen relationships with regional partners and coordinate key conversations with client bureaus and elected officials. Due to the newness of the program, further description of activities, results and engagement is premature.

Equity Impacts

Akin to other Office of Government program offers, the Regional Relations Program will advocate for issues impacting underserved communities. Additionally, the Program will conduct outreach to key partners representing underserved communities and identifies areas of collaboration for lobbying.

Changes to Program

Changes due to external factors:
The Program is too new to evaluate this factor.
Changes to resources:
The Mayor's Office has requested all City bureaus reduce their operating budgets by 1% in the FY 2019-20 Budget. The 1% reduction cumulatively comes from local travel, international gifts, education and professional development, and office supplies and operations. Reductions to local travel may impact the Regional Relations, but the program is too nascent to tell at this time. The reduction to office supplies and operations may hinder the smooth operation of day-to-day work. Additionally, the importance of highly skilled employees is paramount to the work of representing the City to outward interests, which may be impacted by fewer opportunities for professional development.
Changes to Organizational Structure:
In the FY 2018-19 budget, the Office of Government Relations added a Deputy Director & Regional Relations position. The recruitment process took place half-way through FY 2018-19 due to classification complications outside of the Office's control. The position was finally filled in January of 2019.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	12,314
Internal Materials and Services	0	0	0	35,914
Personnel	0	0	0	287,400
Sum:	**0**	**0**	**0**	**335,628**
FTE	0	0	0	1.6

Resources: OGR operates from General Fund and interagency agreements between other City bureaus.

Expenses: The expenditures for OGR are generally personnel, travel and operating expenses.

Staffing: Currently, under the organizational structure, Government Relations has ten full-time staff (FTE). The Regional Relations Program has one FTE. One-fifth of the administrative and management staffing budget is also allocated to the Regional Relations Program.

Assets and Liabilities: None

Program Information

Bureau: Office of Government Relations
Website: https://www.portlandoregon.gov/ogr/
Program Contact: Dan Eisenbeis
Contact Phone 503-823-3011

State Relations Program

Program Description & Goals

The State Relations Program leads the development of a legislative agenda that reflects the priorities of the Mayor, City Council, Auditor and bureaus. State Relations is responsible for centrally coordinating and executing the City of Portland's lobbying efforts at the Oregon Capitol, including advancing the City's agenda, pursuing positive funding and policy opportunities, and defending against efforts to limit or preempt local authority. In furtherance of the Office's Racial Equity Plan, the State Relations Program advocates for issues of importance to underserved communities. Recent examples include, but are not limited to: Increasing funding for affordable housing and homelessness; Lifting the preemption on inclusionary housing;
Strengthening tenant protections statewide;
Establishing a state Task Force on Addressing Racial Disparities in Homeownership;
Raising the minimum wage; Codifying authority for the Cleaner Air Oregon program to reduce industrial air pollution; and Creating local enforcement capabilities for Minority and Women-Owned Business Enterprises contracting programs.
State Relations also helps build advocacy capacity in the community via an annual Advocacy 101 event and receives public input from a concurrent Legislative Townhall. The Program also looks to actively build the pipeline of policymakers, legislative staffers and lobbyists through outreach, informational interviews and job shadows.
Important performance measures for the State Relations Program are legislative outreach; feedback from the Office's annual customer service survey on responsiveness, progress on issues and overall performance; setting an agenda and completing a final legislative report each session.
Successful state legislative advocacy relies on having strong relationships across the state and political affiliations. Trusting, communicative relations with clients are core to understanding and effectively delivering the City's position on legislation. Finally, clear reports conveying the City's agenda and the key legislation tracked, and their final disposition, are important resources to the public and client offices and bureaus.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of targeted legislators contacted	90%	87%	90%	90%	90%
Percentage of Respondents Rating Government Relations either Very Responsive or Responsive	100%	98%	97%	100%	100%
Percentage of respondents rating services as excellent or very good	97%	86%	95%	95%	95%
Percentage of respondents reporting progress made on state, federal, or intergovernment issues	75%	97%	90%	75%	75%

Explanation of Services

The City of Portland does not operate in a vacuum and shares constituents with many other levels of government: regional, state, federal, tribal and international. At the State level, the Oregon Legislature uses its constitutional authority to direct funds, set policy, and occasionally preempt local action. In order to both protect City priorities and advance a robust policy agenda, the State Relations Program is tasked with lobbying state legislative and executive entities. Every year, the State Relations Program works with Council and Bureaus to vet, develop and approve a comprehensive agenda. Recent lobbying activities resulted in the following benefits to the City and Portlanders:
Raising an additional $61.0 million per biennium for the Emergency Housing Account, State Homeless Assistance Program, and General Housing Account Program by increasing the document recording fee from $20 to $60;
Directing over $200.0 million in new transportation maintenance dollars over eight years, as well as $2.0 million for SW Capitol Hwy, $1.5 million for NE Columbia Blvd, and $110.0 million for SE Outer Powell Blvd;
Improving coordination between the City and State for cleanup and maintenance of public spaces;
Advancing carbon reduction measures and mitigating climate change, including the phase out of coal-generated power by 2030;
Lowering speed limits on residential roads and expanding speed enforcement tools;
Referring a constitutional amendment (subsequently approved by voters) providing the City with enhanced flexibility to manage Portland Housing Bond proceeds;
Establishing clear statutory requirements for short term rentals to pay transient lodging tax;
Authorizing local property tax incentive programs to promote brownfield redevelopment and seismic retrofit of buildings, respectively;
Authorizing local financing programs to promote investments in energy efficiency and seismic retrofit building upgrades;
and Protecting and expanding state shared revenues through 9-1-1 and state marijuana taxes.
The State Relations Program operates on a two-year cycle. The Oregon Legislature meets annually, but convenes for a “long” session (160 days) during odd-numbered years and “short” session (35 days) during even-numbered years. When the Legislature convenes, whether in session or for other purposes (e.g., Legislative Days, Revenue Forecasts, etc.), State Relations is present in Salem. During the course of a legislative session, this typically means 60+ hour weeks and ~100 mile daily commutes. When the Legislature is not in session, the State Relations Program is drafting the end of session report; building the following session’s agenda; conducting outreach to legislators and important partners; and addressing ad hoc political issues as they arise for client offices and bureaus. Once a year, the State Relations Program works with partner bureaus and/or Council Offices to hold an Advocacy 101 session and Legislative Townhall to both train community members on how to be better advocates and solicit input on the draft legislative agenda.

Equity Impacts

This past year, OGR incorporated explicit direction in the legislative agenda building process for client offices and bureaus to apply an equity lens when considering and submitting ideas for potential inclusion in the City’s legislative agenda. As part of the legislative agenda development and preparation for session, the State Relations Program conducts specific outreach to key partners representing underserved communities and identifies areas of collaboration for lobbying. The Bureau’s Racial Equity Plan specifically directs the State Program to advance issues impacting underserved communities (see recent examples in Program Description & Goals). Finally, the State Program holds an annual Advocacy 101 event, which a few years ago was intentionally moved outside of the downtown core. The educational event teaches community members how to be effective advocates at the State Legislature. Materials are provided in Spanish and English and accommodations are offered for the event. The presenter panels have often included elected officials and stakeholder organizations representing underserved communities, and State Relations works with partner bureaus and/or council offices to broadly publicize the event, including to underserved communities.

Changes to Program

Changes due to external factors:
The State Legislature operates on a biennial calendar. During odd-numbered years, the Legislature convenes for approximately 5.5 months (so-called “long-session”); during even-numbered years, it convenes for just over a month (so-called “short session”). The State Relations Program consumes more resources during long-sessions due to increased use of fleet vehicles, hiring temporary administrative staff support, purchasing legislative materials, etc. This cycle is predictable and built into the Office’s budget.
Changes to resources:
The Mayor’s Office has requested all City bureaus reduce their operating budgets by 1% in the FY 2019-20 Budget. The 1% reduction cumulatively comes from local travel, international gifts, education and professional development, and office supplies and operations. The State Program is eliminating all but one landline from the Salem office, transitioning to use of cellphones for lobbyists. Other reductions to office supplies and operations may hinder the smooth operation of day-to-day work. Additionally, the importance of highly skilled employees is paramount to the work of representing the City to outward interests, which may be impacted by fewer opportunities for professional development.
Changes to Organizational Structure:
Staffing and resource allocations to the State Relations Program remain the same.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	20,814
Internal Materials and Services	0	0	0	59,511
Personnel	0	0	0	540,060
Sum:	**0**	**0**	**0**	**620,385**
FTE	0	0	0	3.6

Resources: OGR operates from General Fund and interagency agreements between other City bureaus.

Expenses: The expenditures for OGR are generally personnel, travel and operating expenses, including a leased office space in Salem that is reserved for State Relations staff to utilize at any time.

Staffing: Currently, under the organizational structure, Government Relations has ten full-time staff (FTE). The State Relations Program has three FTE plus one temporary, full-time staff person during the long legislative session (23+ weeks) and short legislative session (5+ weeks), which alternate each year. One-fifth of the administrative and management staffing budget is also allocated to the State Relations Program.

Assets and Liabilities: None

Program Information

Bureau: Office of Government Relations
Website: https://www.portlandoregon.gov/ogr/33419
Program Contact: Dan Eisenbeis
Contact Phone 503-823-3011

Tribal Relations

Program Description & Goals

The Tribal Relations Program promotes culturally grounded, long-term, positive relationships and decision-making processes through government-to-government engagement with Tribal governments and the urban American Indian/Alaska Native community. The Program affirms and strengthens the City of Portland's commitment to the urban American Indian/Alaska Native community and coordinates policymaking to ensure that there is access to opportunities for a high quality of life. The Program is also responsible for an annual summit and quarterly policy meetings of tribal government leaders.

The Tribal Relations Program advises Bureaus and Council Offices on outreach to, and interactions with, Tribal governments and the urban Indian community. Likewise, the Program fields requests and inquiries from Tribes and community members about engagement with the City.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Respondents Rating Government Relations either Very Responsive or Responsive	100%	98%	97%	100%	100%
Percentage of respondents rating services as excellent or very good	97%	86%	95%	95%	95%
Percentage of respondents reporting progress made on state, federal, or intergovernment issues	75%	97%	90%	75%	75%

Explanation of Services

The City of Portland does not operate in a vacuum and shares constituents with many other levels of government: regional, state, federal, tribal and international. The Tribal Relations Program consists of one FTE located in Portland, Oregon. The Program has three primary foci: (1) to develop and deepen authentic government-to-government relationships with sovereign Tribal governments; (2) to provide technical assistance and support to City of Portland employees in the areas of treaty responsibility, appropriate engagement and inclusion, and to support tribal-related work throughout the City; and (3) to engage, interface and respond to members of the urban Indian community regarding City of Portland actions and policies.

In order to establish and deepen government-to-government relationships, the Tribal Relations Program leads an annual Tribal Nations Summit and quarterly policy meetings of tribal government leaders. The Program also fields requests for exchanges and works with other area governments to coordinate joint areas of interest to engage, consult, or include sovereign tribal nations. Additionally, the program advises Council Offices and Bureaus on a more individualized basis regarding outreach and consultation with Tribes. This includes regular convenings of the liaisons to Tribal Relations from each of the elected offices and bureaus that they oversee.

Within the Office of Government Relations, the Tribal Relations Program regularly collaborates with the City's Federal, State, and Regional programs. This includes advising the impact that policies will have on the urban Native American community and relevant Tribal Nations in the area. Over its first year, the Program provided a number of training opportunities (see examples in Equity Impacts) and will look to partner with Office of Equity and Human Rights to develop standardized trainings for city employees. Robust training that is connected to the annual Tribal Nations Summit is another significant way the Program will deepen City employees' understanding of tribal governments and sovereignty and catalyze better coordination and engagement.

The Program works closely with, and is responsive to, the urban Indian community in Portland. Community members reach out to the Program for assistance navigating the City, when seeking redress, when urging change to City policies or protocols, and when otherwise voicing concerns and the Program responds and assists. The Tribal Relations Director also attends and speaks at community engagement events regularly, provides updates to community and regional organizations, and is recognized as the face of the City within the urban Indian community.

Equity Impacts

The Tribal Relations Program produces significant positive equity impacts. The Program increased access to the City and its leadership for the native community as a whole. Structural barriers in City policies have been identified and addressed as a direct result of this access and engagement. Moreover, by training employees on history, status, and import of Tribal governments and native people, the Program develops more opportunities for culturally-competent consultation and engagement.
Within the City, there have been numerous trainings to raise the awareness about tribal sovereignty, the history of tribes and native people in the Northwest, the legacy of government policies aimed at erasure and how that has resulted in disproportionate impacts on native people. A non-exhaustive list of the trainings over the last year include:
Tribal Nations Summit Employee Training on importance of rivers to tribal people;
Missing and Murdered Indigenous Women (MMIW) speaker panels;
Columbia River Treaty Renegotiation Presentation with Columbia River Intertribal Fish Commission (video recorded for future use);
Tribal Governance, Sovereignty, and Treaties Primer (video recorded for future use);
and individualized trainings to meet specific bureau needs.

The Program has also served as a conduit for community members to seek assistance, redress, and help navigating City government. This engagement has often resulted in the direct benefit of changing City policies and practices to be more inclusive. A few recent examples of direct assistance to the urban Indian community include:
aiding in the recovery of religious items and working with Portland Police Bureau to change practices to use culturally appropriate protocols for reporting and investigating crimes involving sacred items;
improving internal procedures to fulfill electronic records requests, prompted by an MMIW report by a nonprofit organization;
and connecting City community outreach programs (such as Bureau of Emergency Management and Portland Water Bureau workshops and training) to improve inclusion of the broader Native American community beyond nonprofit organizations.

Changes to Program

Changes due to external factors:
The Tribal Relations Program just completed its first year. Demand for the Program has increased internally and externally (via client bureaus and offices, as well as constituents). The ability to address increased demand is directly tied to staff resources, which is currently one FTE.
Changes to resources:
The Mayor's Office has requested all City bureaus reduce their operating budgets by 1% in the FY 2019-20 Budget. The 1% reduction cumulatively comes from local travel, international gifts, education and professional development, and office supplies and operations. Reductions to office supplies and operations may hinder the smooth operation of day-to-day work. Additionally, the importance of highly skilled employees is paramount to the work of representing the City to outward interests, which may be impacted by fewer opportunities for professional development.
Changes to Organizational Structure:
The Tribal Relations Program just completed its first year. Staffing and resource allocations are still being assessed based on workload. For the FY 2019-20 budget, staffing and resource allocations to the Tribal Relations Program remain the same.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	27,314
Internal Materials and Services	0	0	0	35,919
Personnel	0	0	0	241,044
Sum:	**0**	**0**	**0**	**304,277**
FTE	0	0	0	1.6

Resources: OGR operates from General Fund and interagency agreements between other City bureaus.

Expenses: The expenditures for OGR are generally personnel, travel and operating expenses. The Tribal Relations Program also covers 20 top tier gifts for visiting delegations as appropriate cultural protocol, registration fees and travel when needed to attend relevant tribal-focused conventions (e.g. Affiliated Tribes of NW Indians Convention), printing materials for trainings and presentations, fees for speakers, exhibits, or venues, and food when culturally appropriate. There are also expenses related to convening the City's annual Tribal Nation Summit.

Staffing: Currently, under the organizational structure, Government Relations has ten fulltime staff (FTE). The Tribal Relations Program has one FTE. One-fifth of the administrative and management staffing budget is also allocated to the Tribal Relations Program.

Assets and Liabilities: None

Program Information

Bureau: Office of Government Relations

Website: https://www.portlandoregon.gov/ogr/

Program Contact: Laura John

Contact Phone 503-823-3123

BRFS - Accounting Division

Program Description & Goals

Accounting provides centralized accounting operations, financial reporting services, and manages the City's accounting policies, systems, and processes.

By maintaining the financial health and sustainability of the City, the Accounting Division supports the City's goal to deliver efficient, effective, and accountable municipal services, and supports the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

One of Accounting's performance measures highlights the number of Comprehensive Annual Financial Report (CAFR) review audit deficiency comments from external auditors. Over the past several years, the CAFR has received a clean audit opinion from the City's independent financial auditors, with zero deficiencies. Zero audit deficiencies is the goal, as it indicates that the City's systems and processes meet best practices.

Another performance measure highlights the number of days CAFR is completed after fiscal year end. In FY 2017-18, Accounting met its production goal of 120 days, reflecting steady improvement from 173 days in FY 2014. The FY 2018 CAFR report was submitted to the State of Oregon Audits Division and the Government Finance Officers Association (GFOA) on October 30, 2018, far in advance of the December 31 deadline and the earliest it has been completed to date. This accomplishment establishes the City of Portland as a leader in timely financial reporting.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of CAFR review audit deficiency comments from external auditors	0	N/A	1	0	0
Number of days CAFR is completed after fiscal year end	135	124	135	120	120

Explanation of Services

The Accounting Division provides accounting services and financial support to the City. The Accounting Division helps ensure transparency in the City's financial transactions, compliance with City policies, while also providing centralized support to all City bureaus.

Program activities include:
- Preparing financial reports, including the CAFR and the Popular Annual Financial Report (PAFR) that comply with current accounting principles and regulatory requirements
- Processing vendor payments, employee reimbursements, accounting journal entries, and general ledger adjustments
- Ensuring City accounting operations result in accurate, complete, and timely information
- Establishing and maintaining Citywide accounting standards, policies, and associated administrative rules

Equity Impacts

Two years ago, the Accounting Division developed the City's first PAFR. This report summarizes financial information in a straightforward, easy-to-read manner, and is meant to engage the community. In addition, the report has been translated into Chinese, Russian, Spanish and Vietnamese for increased access to community members.

Changes to Program

Government accounting standards continually evolve and require analysis and implementation as appropriate. Cyberthefts and financial fraud schemes require vigilant review of controls over the City's financial operations.

BRFS has attempted to meet the one percent budget constraint by budgeting vacancy savings and employing other efficiency measures to balance division budgets without lowering service levels.

In the past year, the total number of positions in the accounting division has remained consistent. Process efficiencies in the reporting section have allowed for one position to be reclassified and moved to another section to create a needed compliance program within the division.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	91,820	63,838	190,678	94,252
Internal Materials and Services	264,924	465,418	308,578	243,116
Personnel	2,249,593	1,960,695	1,917,515	2,359,219
Fund Expense				
Debt Service	0	0	10,000,000	0
Sum:	**2,606,337**	**2,489,950**	**12,416,771**	**2,696,587**
FTE	21.17	18.17	18.17	17.86

Resources: Primary resources are from the General Fund discretionary and overhead. In addition, several small interagency agreements are in place, which pay for accounting services beyond baseline levels.

Expenses: Approximately 80% of the division expenses are personnel services. All of the approved FTE positions are critical to the success of the division. External and internal materials and services expenses are needed to support the program, including training for career development and professional certifications.

Staffing: The Controller implemented a reorganization effort in FY 2014-15, which created a support team and reclassified three positions to provide growth opportunities and succession planning. In September 2017, the Accounts Receivable team was transitioned to the Revenue Division to achieve process efficiencies. Accounting's current staff consists of 1.0 Controller/ Deputy CFO, 1.0 Assistant Controller/Accounting Manager, 2.0 Accounting Supervisors, 1.0 Financial Analyst II, 1.0 Financial Analyst, 3.0 Accountant IV, 8.0 Accountant III, and 1.0 Accounting Technician.

Assets and Liabilities:	Computer hardware is part of the BTS lifecycle replacement plan. The division recently procured a new CAFR preparation software solution. As the software is subscription and cloud based, the implementation effort was minimal and the cost to implement did not rise above the asset capitalization threshold.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Michelle Kirby
Website:	portlandoregon.gov/brfs	**Contact Phone**	503-823-4358

CAO - Division of Asset Management

Program Description & Goals

The Division of Asset Management (DAM) consists of Facilities Services and CityFleet divisions. The Facilities Services Division is responsible for the maintenance and repair of approximately 16 OMF-owned buildings as well as several customer bureau facilities under interagency agreements. The CityFleet Division is responsible for the maintenance and repair of the City's fleet of over 3,600 vehicles and mobile equipment, and several local jurisdictions' vehicles through contract. CityFleet does not provide services to Portland Fire & Rescue's fire apparatus.

DAM performance metrics are managed at the Facilities and CityFleet division level. The most prominent metrics for this division are related to the percentage of vehicles meeting industry utilization standards and the change in average energy use intensity over the prior year average.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of vehicles meeting industry utilization standards	91%	97%	95%	92%	90%
Percent of on-time preventive maintenance compliance	0	N/A	0	40%	80%

Explanation of Services

The Division of Asset Management is responsible for the overall performance of OMF's Asset Management Program, cost effective life-cycle management of OMF's building portfolio, and the City's fleet of vehicles and mobile equipment. Using the Strategic Asset Management Plan as a guide, and utilizing industry-standard asset management principles, techniques, processes, technology, and data analytics, the DAM manager will drive the development and continuous improvement of the Asset Management Program.

DAM staff provides a suite of services to managers of CityFleet, Facilities Services, and the Division of Asset Management. Service provisions include organizational development, budgeting and planning, data analytics, performance measurement, process improvement and documentation, and resource management.

Equity Impacts

The OMF Division of Asset Management advances equity within its internal service delivery framework through the following methods:

- Facilities' active participation in the Prime Contractor Development Program.
- Facilities' compliance with all applicable laws and city policies governing contracting with minority-owned businesses and community benefit agreements on large capital projects.
- Both divisions' focused outreach to women and communities of color for recruitments – both communities are historically underrepresented in the building trades and vehicle repairs services fields.
- Creation of the Facilities Maintenance Technician Apprenticeship and Utility Worker programs intended to increase the representation of historically under-represented classes in the Facilities workforce.
- Active participation in the OMF Equity Committee.

Changes to Program

The Division of Asset Management is charged with the stewardship of OMF's growing building portfolio and the City's growing vehicle fleet. Facilities' customer bureaus are demanding more secure, clean, comfortable, and healthy work environments that are kept functionally and technologically current at a low cost. CityFleet's customer bureaus are demanding more cost-effective vehicle maintenance and repair services and higher equipment availability. DAM does not anticipate changes to resources or organizational structure.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	-40,000	112,090
Internal Materials and Services	0	0	70,500	109,989
Personnel	0	0	-30,500	766,552
Sum:	**0**	**0**	**0**	**988,631**
FTE	0	0	0	5

Resources: The Asset Management Program is funded through interagency agreements with the Fleet and Facilities internal service funds.

Expenses: Program expenditures are primarily for five employees and support costs through external and internal materials and services.

Staffing: The program has 5.0 FTE, including the manager of the Division of Asset Management and four employees that provide services to DAM's management team.

Assets and Liabilities: The program has no significant assets or liabilities. All of the assets and liabilities of the Division of Asset Management are in the CityFleet and Facilities funds.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/dam/

Program Contact: Carmen Merlo

Contact Phone 503-828-5665

CAO - Business Operations

Program Description & Goals

Business Operations is the Office of Management & Finance's centralized provider of financial management, communications, administrative, and business services. Major functions include financial oversight of OMF's budget development, budget monitoring, and daily financial transactions. Administrative Services include timekeeping, medical claims, and personnel actions. The Communications Team responds to public records requests and media queries, monitors the OMF Strategic Plan, and coordinates bureau and Citywide strategic communications.

Business Operations offers dedicated subject matter experts and deploys systems and processes to a portfolio of assignments and customer bureaus. The completion of budget communications and personnel-related services are indicators of success, in addition to positive customer feedback and expanding centralized services.

Business Operations supports bureau equity goals by incorporating equity principles and practices into the services provided to customer bureaus.

Business Operations performance measures include the percentage of accounts payable processed within 30 days and the percentage of OMF General Fund ending fund balance within policy.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percent of Accounts Payable within 30 days	82%	80%	90%	100%	100%

Explanation of Services

The Office of Management & Finance is a bureau comprised of four organizations, over $730 million in total appropriations, and over 706 staff. Business Operations provides three key centralized services to the organizations of OMF:

- Communications and strategic planning
- Budget development and monitoring
- Personnel-related administrative services including timekeeping, medical claims, and personnel actions

The Deputy Chief Administrative Officer and Communications Services provide strategic planning, centralized messaging, change management support, media and public information, project and program management, and community involvement services for OMF projects and initiatives.

Financial management services include coordinating OMF financial management process, budget development and monitoring, financial analysis services, accounting function and accounts payable services, and other financial services.

Administrative support services include timekeeping and payroll, personnel actions and administrator service, medical claim services, contract and purchasing services, and other administrative support services.

Equity Impacts

Business Operations strives to connect equity work with the broader vision of the City, incorporating principles and practices of racial equity into bureau service wherever possible. Business Operations is the managing partner for budget development, incorporating the budget Equity Assessment Tool into processes and budget submissions. As a buyer of service contracts and having a role in assisting customer bureaus procure services, Business Operations is familiar with MWESB firms and City procurement rules and allowances encouraging the maximization MWESB awardees. As a service provider for personnel actions and onboarding for customer bureaus, Business Operations encourages racial equity goals in hiring practices, training goals and monitoring, and provision of onboarding resources and materials for resources such as racial equity committees.

In FY 2018-19, Business Operations reinstituted a racial equity committee, focusing on hiring and onboarding, training, and services responsive to existing employees such as evaluations, exit interviews, and other HR practices. Reviving equity participation and support maximizes on the influence that may be exerted by Business Operations as a service provider to OMF.

Changes to Program

Changes to the program include a reduction of resources as directed by the Mayor. Business Operations will manage vacancy savings to meet the one percent reduction in service appropriation, minimizing as much as possible service impacts to customers.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	164,228	167,575	461,151	117,115
Internal Materials and Services	403,634	405,630	467,375	424,662
Personnel	3,387,217	3,333,379	4,206,298	4,043,603
Ending Fund Balance	45,907,889	57,828,976	0	
Sum:	**49,862,968**	**61,735,560**	**5,134,824**	**4,585,380**
FTE	28	28	31.85	28

Resources: Business Operations receives both General Fund resources and interagency funding to provide services to General Fund funded bureaus, and interagency rate based funded bureaus.

Expenses: The primary expense in the Business Operations budget is staffing.

Staffing: Business Operations has 28.0 FTE. Under the direction of the Deputy Chief Administrative Officer, the following teams provide service to OMF bureau customers: 3.0 FTE Administrative Team, 6.0 FTE Communications Team, 5.0 FTE General Fund Budget Team, 7.0 FTE Division of Asset Management Team, 6.0 FTE Bureau of Technology Services Team.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Carmen Merlo
Website:	https://www.portlandoregon.gov/cao/26641	**Contact Phone**	503-823-5288

BTS - Administration & Support

Program Description & Goals

BTS's Administration & Support program supports the City's goal to deliver efficient, effective, and accountable municipal administrative services as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions by setting Citywide policy governing the use of technology resources.

Program performance measures include a four-day target of filling personal computer orders, which has remained steady for the last five years. The program has a strategic target to achieve a three-day turnaround in FY 2021-22.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Administration & Support program activities support the bureau's long-term goal of ending disparities in City government hiring and promotions by:

- Ensuring performance appraisals and evaluations for managers and supervisors include progress on racial equity and cultural responsiveness goals.
- Subject Matter Expert (SME) resume reviewers are consulted to eliminate institutional and personal racial bias in the resume review process.
- All bureau staff have opportunities to develop racial equity competencies and staff of color have meaningful opportunities for professional growth.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of days elapsed from ordering a new desktop PC to installation	4	4	5	4	3

Explanation of Services

Under the guidance of the Chief Technology Officer (CTO), Administration & Support delivers efficient and effective ordering, storekeeping, budget development, and administrative services. Administration & Support plans, organizes, integrates, and directs the organization, financial management, administration, personnel, and operations of the bureau.

Administration & Support executes streamlined processes to deliver timely and efficient technology product orders, delivers consistent and effective administrative services including bureau policy development, timekeeping, payroll, and personnel administration, maintains effective inventory controls, and provides budget coordination with OMF Business Operations.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

BTS's base budget was developed with the goal of achieving one percent reductions by identifying efficiencies with minimal service impacts in FY 2019-20.

Since 2016, BTS has acquired two additional City programs: Enterprise Business Systems (EBS) and Printing & Distribution (P&D). The addition of these programs came without additional administrative support resources, resulting in continued efforts to streamline processes to ensure staff administrative needs are being met.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	207,601	269,126	348,454	287,954
Internal Materials and Services	6,480,891	6,313,424	1,784,152	1,694,231
Personnel	1,589,146	1,557,061	1,769,540	2,144,539
Fund Expense				
Contingency	0	0	20,524,337	5,501,392
Debt Service	142,323	142,324	647,474	686,801
Fund Transfers - Expense	2,003,245	2,046,284	2,353,768	3,266,440
Sum:	**10,423,206**	**10,328,219**	**27,427,725**	**13,581,357**
FTE	12	12	14	14

Resources: The Administrative & Support program's budget is redistributed to other bureau programs as overhead and is supported through both interagency and non-City revenues. In general, these resources are stable and sustainable, but are subject to changes in the economy. Prior year trends have shown slow but steady growth in resources as customer bureaus have benefited from the strong local economy. The forecasted trend is for that growth to continue, but at a slower rate.

Expenses: The program's primary expenses are in personnel services, internal materials and services (M&S), and cash transfers. Personnel expenses are relatively fixed and predictable and are minimized as much as possible considering the staff supports 250 positions. Internal M&S expenses in some cases are recorded in this program even though certain services that are received support all BTS programs. For example, much of the internal M&S expense is for OMF services which benefit the entire bureau. Cash transfers are mainly for General Fund Overhead.

Staffing:	BTS Administration & support positions include the Chief Technology Officer (Director II), Assistant Chief Technology Officer (Deputy Director II), Executive Assistant (Administrative Specialist II) Technology Capital Project Managers, IS Supervisor, Operations Manager (Analyst III), Administrative Specialist II, and Storekeepers.
Assets and Liabilities:	N/A

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Amy Tuttle
Website:	https://www.portlandoregon.gov/bts/index.cfm?	**Contact Phone**	503-823-7930

CAO - Office of the Chief Administrative Officer

Program Description & Goals

The Office of Management & Finance (OMF) provides internal services to support the operational needs of City bureaus, as well as coordination and leadership on overall administrative services. OMF is overseen by the Chief Administrative Officer (CAO).

The Office of the CAO provides leadership and oversight for a variety of Citywide projects and programs and plans and directs an array of financial management, policy development, and project management services for Council and City bureaus. The CAO leads the development of the bureau's strategic plan and ongoing reporting on the completion of strategic objectives and initiatives. The CAO oversees the bureaus of Human Resources, Revenue and Financial Services, and Technology Services.

The Office of the CAO furthers the City goal to deliver efficient, effective, and accountable municipal services, as well as OMF's strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions. In FY 2019-20, the bureau will manage a budget of $730 million in 18 funds, and 706 staff.

Performance of the Office of the CAO is measured by the program's ability to carry out enterprise solutions on behalf of Council and the City of Portland.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The Office of the CAO provides leadership, oversight, and direction to internal service support and operational service managers in OMF. The CAO directs the bureaus of Human Resources, Revenue and Financial Services, and Technology Services.

The Office of the CAO also provides Citywide leadership in the broader vision of the City, convening the Bureau Directors to discuss current and future needs and lead process improvement efforts; convening groups such as the OMF Customer Workgroup tasked to examine centralized service delivery to bureau customers, and playing a key role in evaluating and updating budget processes to focus on core City services and service needs.

The Office of the CAO implements the FY 2018-20 Strategic Plan that advances three inter-related strategies: adopting 21st century business solutions, developing an inclusive and talented workforce, and leading Citywide initiatives. It was created through an inclusive process involving OMF employees, City bureaus, and City Council. The Strategic Plan focuses our efforts in the same direction throughout the organization. It will also provide our customers and partners an understanding of our priorities and provides a tool to measure accountability.

Equity Impacts

The Office of the CAO provides strategic leadership and direction to OMF, including emphasis on diversity, equity, and inclusion efforts within the organization and in support of broader social equity efforts in the community through programs including the Community Opportunities and Enhancement Program. The FY 2018-20 Strategic Plan contains an equity focused strategy in the development of an inclusive, talented workforce, as well as specific tactics which offer more specific goals for each strategy:

-Implement OMF-wide and OMF bureau equity plans to assure that the City's racial equity goals are achieved.
-Implement the City's social equity initiatives to support minority and women-owned business and promote a diverse workforce.

Changes to Program

The Office of the CAO budget is almost entirely personnel costs for the CAO and Executive Assistant.

The one percent reduction will be managed with a reduction and/or efficiencies in external materials and supplies.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	18,398	146,019	135,242	58,202
Internal Materials and Services	83,137	87,053	42,812	64,006
Personnel	736,463	979,001	400,000	424,737
Sum:	**837,998**	**1,212,072**	**578,054**	**546,945**
FTE	4.45	6.75	2	2

Resources: The Office of the CAO is funded with General Fund Discretionary and Overhead resources.

Expenses: The primary expense in the Office of the CAO budget is staffing.

Staffing: The Office of the CAO has 2.0 FTE: the CAO, and one Executive Assistant.

Assets and Liabilities: NA

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/cao/60165

Program Contact: Tom Rinehart

Contact Phone 503-823-5288

CAO - Spectator Venues & Visitor Activities Program

Program Description & Goals

The Spectator Venues and Visitor Activities Program oversees City-owned spectator and performing arts venues including the Veterans Memorial Coliseum (VMC), Providence Park, the Portland'5 Centers for the Performing Arts (P'5), and the Rose Quarter Plaza and Parking Garages. Program staff are also the primary liaisons to travel, tourism, and visitor development efforts. The program oversees the Spectator Venues & Visitor Activities Fund (SVVAF), which is a self-sustaining enterprise fund that accounts for resources and requirements for program activities. The SVVAF is responsible for City-obligated expenses at the facilities and debt service payments on certain obligations.

The program goals are to 1) support successful operations of the venues, 2) to meet all program expense obligations while protecting the General Fund, 3) provide resources for activities and investments that improve the condition and viability of the venues, and 4) support growth of the sports, travel, and tourism industry in Portland.

Historically, the program has relied on the Rose Quarter venues for much of the revenues required for expenditures. Recent strong financial performance at the Rose Quarter has increased reserves and allowed strategic investments to be made in several capital projects at the venues to better serve the community and improve their long-term viability.

The program supports the OMF Racial Equity Plan by working with venue operators to provide equitable access to the venues including amateur sports and non-profit community events as allowed by our agreements, by awarding contracts to Oregon COBID certified firms when possible, and by following all applicable OMF/CAO policies and procedures regarding recruitment, hiring, and staff training and education.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of minimum Spectator Venue & Visitor Activities Fund operating reserved maintained	0	N/A	0	100.00%	100.00%

Explanation of Services

The program is responsible for overseeing a City-owned portfolio of venues valued at over $500 million and maintaining effective and mutually-beneficial professional relationships with the venue operators. Oversight of the contractual agreements with the operators is a key function of the program. Major program activities include facility operations, maintenance, repair, and capital improvements; financial planning and contract administration; special projects; and liaison activities among City bureaus, other governmental agencies, and private parties including a broad range of organizations engaged in travel, tourism, and visitor development activities.

In the past two fiscal years, the activities of the program have contributed directly to increased use and profitability at the VMC and Rose Quarter garages, developing the agreement and incentives package needed to allow the construction of a $57 million privately-funded expansion at Providence Park, engineering studies to improve seismic resiliency at the Keller Auditorium and VMC, negotiation of an amendment to the Visitor Facilities Intergovernmental Agreement, and improvements to access for people with disabilities at all the venues.

Within the program, community members have occasionally been involved in specific project-related matters including the development of a Title II ADA Transition Plan to improve access at the venues and in some matters that go to City Council for approval, but most day-to-day activities and responsibilities of the program do not require, and would not necessarily benefit from, increased direct community engagement.

Equity Impacts

By accommodating a wide range of events including but not limited to professional and amateur sports, large and small concerts, amateur, professional, and youth performing arts, ballet, opera, symphony, traveling Broadway theater, conferences, exhibitions, meetings, religious events, reunions, and non-profit community events, the venues collectively serve a very broad and diverse segment of residents and visitors to Portland. The venues are also important economic engines for the City as they generate hundreds of direct jobs and support many more through the direct and indirect spending associated with event production and attendees.

The program is responsible for implementation of the City's ADA Title II Transition Plan at the venues within the portfolio. The program maintains a database of the 2,739 potential barriers identified at the facilities and is working with the operators on implementation of the Council-approved 20-year mitigation workplans for each building. Annual progress reports are submitted to the Office of Equity and Human Rights on Transition Plan implementation. As of fall 2018, 436, or 15.9% of the inventoried barriers, have been addressed.

The projects described in the following section all directly or indirectly improve the venues' ability to safely and effectively serve the community, and all have access improvement components.

Changes to Program

Program workload has increased over the past few years as several major projects have been underway. These include oversight of the major expansion at the stadium, completion of the VMC Refresh Project, planning and early design work for future renovation projects at the VMC and the Portland'5 facilities, and efforts to negotiate a major amendment to the Visitor Facilities Intergovernmental Agreement. In addition, because of strong revenue generation by the Rose Quarter facilities, the program has been able to support several needed capital projects at the venues including lighting upgrades at the VMC and roof replacement projects at the VMC and the stadium. The program is also supporting two new inter-bureau coordination efforts: The Venue Safety & Security Group and the Greater Rose Quarter Coordination Group. Both groups meet monthly.

Demands for major capital renovations at several of the facilities greatly exceed projected SVVAF revenues and the program is actively engaged in seeking other revenue sources for key projects.

The program is housed within the Strategic Projects and Opportunities Team under the Deputy Chief Administrative Officer. The program is supported through a service area agreement with Business Operations for financial, contracting, and other support services, which allows the program's 2.0 FTE to focus more on program activities and projects and less on administrative activities.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	1,803,114	1,421,860	2,457,000	1,700,000
External Materials and Services	5,052,890	3,351,799	3,542,464	3,924,250
Internal Materials and Services	185,266	318,880	320,431	386,756
Personnel	379,665	411,779	480,790	501,867
Fund Expense				
Contingency	0	0	7,730,539	7,245,345
Debt Service	0	0	3,441,592	3,442,375
Fund Transfers - Expense	133,406	148,579	210,338	230,848
Sum:	**7,554,341**	**5,652,897**	**18,183,154**	**17,431,441**
FTE	2.15	2.15	2.15	2.15

Resources: The program is entirely funded by revenues from the SVVAF. The SVVAF collects revenue from the venues according to the terms of the agreements and receives a modest annual allocation from the Visitor Facilities IGA. Most of the revenue comes from Rose Quarter user fees and event parking fees. These revenues are variable and dependent on the venue operators' ability to attract events and the performance of the Trail Blazers.

Expenses: Program expenditures for bonded debt on the venues is a known amount. Expenditures associated with required repairs and maintenance at the venues are less predictable and can vary significantly on an annual basis depending on unforeseen repair needs. Repair costs are increasing as the venues age and more systems reach the end of their useful life. When revenues permit, the program can support additional capital projects at the venues. The recently completed $5 million VMC Refresh project is one example.

Staffing: The program includes two permanent full-time positions and is supported by a financial analyst in OMF Business Operations under the terms of a service agreement. To further support the program and assist on specific projects and tasks, the program budget usually includes funds for one or more part-time temporary employees.

Assets and Liabilities: Physical assets overseen by the program at the Rose Quarter include the VMC, East and West Garages, Plaza, Benton Parking Lot, and the Phase II lot as well as the land leases for the Moda Center, Garden Garage, and Annex complex. Additional properties overseen by the program include Providence Park and the three theater buildings operated by Portland'5 (Antoinette Hatfield Hall, the Arlene Schnitzer Concert Hall, and Keller Auditorium).

The facilities overseen by the program are generally in good condition except for the VMC, which is in poor condition. All the venues are aging and will require significant capital reinvestments to keep them in (or return them to) good condition in the future. According to the terms of the agreements, the program relies on the venue operators to plan for major maintenance and replacement efforts, which the City is required to pay for. Revenues are not sufficient to pay expenses anticipated by needed major renovations required at several of the venues without significant contributions from other funding sources.

The program is responsible for bond payments associated with previous projects. Annual debt service obligations ranging from $2.2 to $3.3 million continue through FY 2026-27.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Karl Lisle
Website:	https://www.portlandoregon.gov/cao/61142	**Contact Phone**	503-823-5876

CAO - Project Management for Citywide Initiatives

Program Description & Goals

The Project Management for Citywide Initiatives (PMCI) work group is housed in OMF's Strategic Projects and Opportunities Team (SPOT) and manages complex multi-bureau, Citywide, and intergovernmental initiatives and projects. PMCI projects and programs typically require multi-disciplinary project management and a collaborative, multi-bureau approach to issue identification, resolution, and decision-making. PMCI assignments focus on efforts to align regulations, activities and outcomes with City goals, policies and plans; process improvement efforts to improve and enhance service delivery; and ongoing efforts to track processes and issues affecting the City, to build and maintain relationships with internal and external stakeholders, and to provide support and information as needed.

PCMI staff collaborates with City Council and Commissioners' staff, bureau directors, City staff, and external stakeholders to achieve agreeable outcomes by convening multi-disciplinary stakeholder groups, analyzing complex policy and operational solutions, and recommending courses of action to City leaders.

PCMI's workload provides opportunities to collaborate with employees and managers throughout OMF, other City bureaus, elected officials and their staff, and with external stakeholders on outcomes that advance the Citywide Racial Equity Goals and Strategies Plan as well as OMF's Racial Equity Plan.

Housed in the Office of the Chief Administrative Officer (CAO) and reporting through the Deputy CAO (DCAO), the PMCI is part of the larger Strategic Projects and Opportunities Team (SPOT). SPOT, as an organizational unit, encompasses three programs:

- Project Management for Citywide Initiatives, addressed in this program offer
- Spectator Venues Program*
- City Arts Program* (budgeted through Special Appropriations)

* Spectator Venues and City Arts programs have restricted funding streams and specialized workplans and are covered in separate program offers.

PCMI projects are complex and frequently take multiple years to realize results. Performance is measured through the program's successful alignment of regulations, activities, and outcomes with the City's goals, policies, and plans. Program success can also be measured through enhanced Citywide service delivery, upon completion of PCMI-led process improvement efforts.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target

Explanation of Services

The PMCI was created to bring a Citywide perspective to enterprise issues, implement Citywide initiatives, and to provide analysis and recommendations on policy and business decisions. City Council and bureau directors rely on the PCMI to provide project management leadership for multidisciplinary projects of Citywide or enterprise significance. PCMI projects impact substantial portions of City operations, staff, or service delivery and presents significant policy, financial and/or community implications and consequences. Projects may last for a few months to a few years, depending on the complexity of the work. In addition, staff also manage a variety of other limited

term and on-going projects and efforts.

Current activities include:

Build Portland: A PMCI project manager is leading the multi-year, multi-bureau initiation of the program approved in March 2018 to fund the first phase of seven projects with up to $50 million in tax revenue bonds to fund infrastructure renovations and repairs; resulting in up to $600 million over the next 20 years for investment in improving the roads, bridges, parks, and buildings that the community uses every day. This effort will continue in FY 2019-20.

Enterprise Asset Management Strategy: A PMCI project manager is collaborating with staff from OMF and other bureaus on a multi-bureau effort to develop Citywide policies to support asset management as a core City business function. This effort will continue in FY 2019-20 but may transition to other OMF areas during FY 2019-20.

Paper: Less and Later: A PMCI project manager is leading an OMF-wide test of filing council documents electronically – from the creation of documents within each OMF bureau through approval and signature of the CAO, City Attorney, and Mayor's Office, to the Auditor's Office for final review, authorization, and submittal to Council. The pilot test of this effort is expected to conclude in FY 2019-20 and may lead to a Citywide, multi-year project in future years.

3-1-1/Customer Service Improvement Project: A PMCI project manager is leading a multi-year, multi-bureau effort to plan for and implement a new Citywide 3-1-1 Program. This program will provide a first stop solution for questions and requests from community members via telephone, web and in person. The Citywide 3-1-1 Program will complement the City's existing customer service efforts and enhance community access to City information and services. This effort will continue as a PMCI project through most of FY 2019-20 but the operational lead responsibility for the new program is expected to transition to the Office of Community & Civic Life during FY 2019-20.

Floodplain Management/BiOp: A PMCI project manager is leading a multi-year, multi-bureau work program to develop a coordinated Citywide response to changes to the National Flood Insurance Program (NFIP) associated with Endangered Species Act (ESA) compliance. The City's continued participation in the NFIP is necessary to make federally-backed flood insurance available to Portland residents and businesses. This effort will continue as a PMCI project through most of FY 2019-20 and the decision on where the lead responsibility resides in the future is expected to be made in FY 2019-20.

Prior to establishment of the PMCI, the work performed by PMCI staff was often difficult to initiate or complete through other channels. PCMI provides project implementation by convening affected stakeholders to fully identify challenges, outcomes, and desired improvements. This is done through researching best practices and developing options for mutually agreed upon solutions to enterprise civic challenges to advance toward resolution and implementation.

Community engagement for PMCI efforts primarily takes place through the participating bureaus; direct community input and engagement is included for appropriate projects. The nature and degree of community engagements varies greatly depending on the effort, many of which are more internally focused. PMCI staff are have strong knowledge of the Citywide Racial Equity Goals and Strategies Plan and the elements of diversity, equity and inclusion are significant drivers in defining and developing project outcomes and implementation strategies.

Equity Impacts

The PMCI program is connected to the broader equity vision of the City to benefit communities by implementing components of the Citywide Racial Equity Goals and Strategies Plan as well as OMF's Racial Equity Plan as follows:

Fairness in hiring and promotions, greater opportunities in contracting, and equitable services to all residents: PMCI staff participate in numerous City of Portland employee hiring processes, both within the Strategic Projects and Opportunities Team and for OMF and partner bureaus across the City, receiving bias training, serving as subject matter experts to review applicant materials, and sitting on interview panels. Some CIPMG programs and projects require PTE contracts, providing opportunities in contracting to meet or exceed the City's target rate of 20% MWESB. Both hiring and contracting processes meet the requirements of ADA Title II and Civil Rights Title VI.

Strengthen outreach, public engagement, and access to City services: PMCI program staff use best practices in equitable community outreach and engagement to ensure the needs and input of traditionally under-served and under-represented communities inform recommendations on the citywide programs and projects led by PMCI. The citywide breadth of PMCI's programs and projects provides opportunities to advance racial equity best practices enterprise-wide and to meet the requirements of ADA Title II and Civil Rights Title VI.

Collaborate with communities and institutions to eliminate racial inequity in all areas of government: The PMCI's work requires staff to collaborate with staff and leadership throughout City government, with elected officials and their staff, and with community stakeholders to plan and implement equitable and effective policies, projects, and programs.

Changes to Program

The PMCI has evolved over several years from a two-person, OMF-focused policy development and oversight team to a four-person, Citywide-focused project management team. In FY 2018-19, the PMCI budget was incorporated into OMF's Business Operations program budget. This FY 2019-20 Program Offer separates the PMCI program to highlight the unique nature of the group's work. Budgetarily, this program offer proportionally redistributes personnel and materials and services budgets from the Business Operations program to the PMCI program. There is no net change in resources allocated.

To preserve the core PMCI function and allow new efforts and projects to be included in the group's work plan, ongoing implementation of the mutually agreed upon solutions and outcomes must transition to other City work groups. In FY 2019-20, two PMCI projects will advance through development of budget decision packages:

- 3-1-1/Customer Service Improvement Project: Approval of $662,105 in the FY 2019-20 budget, including $251,710 of one-time funds, will shift this PMCI project to an initial implementation phase. PMCI staff is anticipated to remain engaged in the work through most of FY 2019-20 but the operational lead responsibility for the new program is expected to transition to the Office of Civic & Community Life in early FY 2019-20.

- Floodplain Management/BiOp effort. Approval of $280,000 as a one-time Special Appropriation allows the effort's implementation activities to get underway in FY 2019-20. PMCI staff is anticipated to remain engaged in the project through most of FY 2019-20 and the decision on where the lead responsibility for implementation of regulatory work components is expected to be made in FY 2019-20. A five-year multi-bureau implementation work plan will be completed in early FY 2019-20and will be used to the decision.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	55,434
Internal Materials and Services	0	0	0	50,000
Personnel	0	0	0	659,862
Sum:	**0**	**0**	**0**	**765,296**
FTE	0	0	0	3.75

Resources: The program is primarily funded through General Fund ongoing discretionary and overhead.

Expenses: Primary program expenses include personnel costs for 3.75 FTE. Program expenses for internal and external materials and services needed to support those positions are minimal. The Program budget has very limited capacity for external materials and services expenses, such as professional and technical expertise (PTE) needed to support and complete projects. Personnel costs will continue to be the largest and most predicable component of the program budget. The program would benefit from additional staff to increase capacity for enterprise-wide project management and allow proactive management of policies, regulations, and Administrative Rules affecting Citywide efforts and service delivery.

Staffing: The program is currently staffed with four positions: one Analyst IV, two Analyst IIIs, and a Coordinator III. The program staff is budgeted at 3.75 FTE; the Analyst IV is budgeted at 0.75 FTE through the PMCI Program Offer, with the remaining 0.25 FTE being budgeted under Spectator Venues Program and the City Arts Program.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/cao/60248

Program Contact: Shoshanah Oppenheim

Contact Phone 503-823-4251

BTS - Customer Relations

Program Description & Goals

Customer Relations supports the City's goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions by aligning customer business needs with appropriate technology solutions

Performance is measured by BTS effectiveness in providing Citywide technology leadership, as measured by BTS Customer Service Satisfaction Surveys. On a scale of 1-5, Customer Relations achieved an average of 3.03 in FY 2017-18 – up from 2.6 in FY 2016-17, with a strategic target of 4 in FY 2021-22.

All BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Citywide Technology Leadership Rating (per customer survey, 1-5 scale)	2.60	3.03	2.70	3.00	4.00

Explanation of Services

Customer Relations develops technology solutions, roadmaps, and service level agreements that are aligned with bureau business needs.

Through the Technology Business Consultants (TBCs) and the Enterprise Architecture team (EA), the Customer Relations program is responsible for understanding customer business needs and key challenges. The groups work collaboratively to gather business requirements, manage the project request intake process, and develop technology work plans in concert with the annual budget process. Additionally, the EA team is responsible for developing and maintaining the BTS technology strategic plan and roadmap. Customer Relations provides transparent, timely communications, builds strong relationships between BTS and its customers, and provides creative problem solving for complex or unique technology-related customer business needs.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

BTS's base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20. In FY 2018-19, EA activities were transferred into the Customer Relations program to better align customer engagement services with the City's long-term technology roadmap.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	25,287	24,524	28,688	157,420
Internal Materials and Services	44,186	43,481	44,772	72,395
Personnel	833,646	1,051,916	1,084,995	1,973,598
Sum:	**903,119**	**1,119,921**	**1,158,455**	**2,203,413**
FTE	5	6	8	11

Resources: Customer Relations is a bureau overhead program benefiting all BTS programs. Resources supporting the program come from all interagency rates. The existing program structure allows for equal and open access to all City bureaus for the services the program provides.

Expenses: Program expenses are predominantly personnel as the function of the program is for TBCs and the EA team to work collaboratively with customer bureaus. Costs are effectively fixed and required to meet the requested needs of customers.

Staffing: Customer Relations is comprised of a Customer Relations Manager, an Enterprise Architecture Manager, Technology Business Consultants, and technical analysts.

Assets and Liabilities: There are no key assets owned or operated by this program.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BTS - Business Solutions

Program Description & Goals

BTS Business Solutions supports the City's goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading citywide initiatives, and adopting 21st century business solutions through the development and delivery of innovative application development and management services that allow customers to meet business objectives.

Performance of this program is measured by the availability of PortlandOregon.gov and PortlandMaps.com with the strategic target of 99.99% availability expected to be met in FY 2019-20.

BTS program managers, along with subordinate managers and supervisors, support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Portlandoregon.gov uptime percentage	100.00%	99.99%	99.99%	100.00%	99.99%
PortlandMaps.com uptime percentage	100.00%	99.99%	99.99%	100.00%	99.99%

Explanation of Services

Business Solutions develops and supports Citywide and bureau-specific business applications, services, and advancements compliant with e-government initiatives. This program provides geographic information systems (GIS) services for partner jurisdictions and community members.

Business Solutions responsibilities include providing Citywide application development, implementation, and to support engineering new technology solutions to meet bureau business needs. The program provides oversight for outsourced application development and selection of all third-party applications and services.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

Business Solutions has focused on re-platforming the City's website, known as the Portland Oregon Website Replacement (POWR) project to better meet the needs of its customers and the community.

BTS's base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20.

There were no significant organizational changes to Business Solutions in FY 2018-19.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	80,000	240,500
External Materials and Services	1,070,134	1,158,490	2,270,280	1,406,097
Internal Materials and Services	-767,155	-825,272	386,687	310,027
Personnel	6,775,373	7,393,970	8,388,200	7,361,376
Sum:	**7,078,352**	**7,727,188**	**11,125,167**	**9,318,000**
FTE	58.9	52.9	44.9	45.9

Resources: Resources for the Business Solutions program come from interagency billings to bureaus for maintaining Cayenta, E-Government, GIS, and TRACS corporate service applications. As the City is reliant on these applications, resources are considered to be reliable and sustainable. The current/proposed structure will have no impact on different populations' abilities to access services.

Expenses: This program's expenses are primarily in personnel services since it involves work on developing, maintaining, and supporting Citywide applications. The program also incurs some variable expenses through work on Capital Improvement Projects (CIP) and Operating Projects. There is some discretion in these costs, primarily in the timing of the expenses more so than the actual expense itself.

Staffing: Including an upcoming FY 2019-20 staff transfer of three positions to BTS, Business Solutions include information system specialists and applications analysts.

Assets and Liabilities: Assets in the Business Solutions program are not material. Total assets will increase to about $2,000,000 over the next five years with the completion of two CIP, the City's website replacement, and mobile application management. There is no major maintenance funding through interagency rates to support this program's CIPs and Operating Projects. Projects are funded through technology reserves.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BTS - Communications

Program Description & Goals

The Communications program supports the City's goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions by supporting City and regional mission-critical voice and data communications needs.

Communications is primarily focused on the reliability and availability of critical network and communications systems with comparable availability to public and private industry best practices and standards.

The Key Performance Measure in Communications – reporting the percent of network availability – supports the 2035 Comprehensive Plan which addresses access to universal, affordable, and reliable state-of-the-art communication and technology services. Maintaining a high network availability value assures a reliable system for bureau customers and stakeholders. BTS will continue to exceed the network availability target by investing in a sound, reliable, and secure network infrastructure.

BTS program managers, along with subordinate managers and supervisors, support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage uptime for phone switch	100.00%	100.00%	99.99%	100.00%	100.00%
Percentage Internet availability	100.00%	100.00%	99.99%	100.00%	99.99%
Percentage availability of network excluding scheduled maintenance	100.00%	100.00%	99.99%	100.00%	99.96%

Explanation of Services

Communications maintains a robust telecommunications system, radio services, video surveillance, and network environment.

The responsibilities of the Communications program include responding to and resolving critical voice, video, and network support issues, supporting and maintaining Public Safety Radio and mobile data computer (MDC) installations, and engineering and maintaining the City's communications systems and networks (including the Integrated Regional Network Enterprise (IRNE) and Institutional Network (I-Net)) serving government agencies throughout Multnomah County. Communications ensures the City's fiber assets are properly maintained and managed.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

To prepare the City for 5G and the need for significant bandwidth required for Smart Cities and all other digital initiatives, BTS must build a new fiber optic network. The current network is not scalable or affordable going forward. This project is scheduled to begin in FY 2019-20. The new Fiber Expansion Program will use 67 route miles of existing pole space for the core buildout. This is an aerial build which will include an additional 45 miles of new routes for redundancy. The buildout includes aerial and underground construction.

BTS is currently working with City and external partners for current builds to help reduce time and cost of construction. BTS is exploring potential partnership opportunities with Multnomah County to help defer costs and the time to build.

The BTS base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20.

There were no significant organizational changes to The BTS Communications program does not anticipate major changes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	274,323	285,918	876,444	3,285,793
External Materials and Services	11,956,952	9,453,517	11,920,295	11,799,636
Internal Materials and Services	-1,667,336	-2,999,144	308,165	339,932
Personnel	5,771,742	4,860,595	3,894,309	3,974,413
Fund Expense				
Contingency	0	0	0	6,723,521
Fund Transfers - Expense	62,895	0	1,400,000	0
Sum:	**16,398,576**	**11,600,885**	**18,399,213**	**26,123,295**
FTE	42.83	37	37	28

Resources: Resources supporting the Communications program are primarily through City interagency billings for telecom, radio, video, internet, and data services. In addition, non-City customers provide resources through payments for IRNE and I-Net services. These revenue sources are stable and ongoing as long as users continue to rely on the BTS service provisions. The current program structure will have no impact on different populations' abilities to access services provided by this program.

Expenses: The program's primary expenses are in personnel services and external materials and services (M&S). Both categories of services are considered fixed, predictable and necessary as City and non-City personnel rely on these services in their daily operations. A significant portion of the external M&S expenses are related to CIPs and Operating Projects. Budgets for these projects average $3.5M annually. While the planned work is required and needed to keep systems upgraded and current, there is some flexibility in when the work is scheduled, and the expenses incurred.

Staffing: Communications has 26.0 FTE including program managers, information systems technical analysts, technicians, a technical operations supervisor, and an office support specialist.

Assets and Liabilities: Communications has more than $5,000,000 in assets and plans to add to that amount through projects currently underway. The largest portion of those assets are for the IRNE telecom system. The system is in good condition, though changing technology requires constant upgrades to maximize efficiency. BTS receives some major maintenance funding through its rates to support IRNE projects, but this is not sufficient to cover all projected expenses. Additional funding comes from technology reserves.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Amy Tuttle
Website:	https://www.portlandoregon.gov/bts/index.cfm?	**Contact Phone**	503-823-7930

BHR - Employee and Labor Relations

Program Description & Goals

Employee Relations provides strategic advice and support to assigned bureaus to achieve excellence in employee performance and organizational effectiveness throughout the City. Employee Relations and Police Human Resources assists bureaus in reviewing business processes through a lens that promotes more equitable outcomes for staff, customers, and stakeholders. Labor Relations oversees negotiations, responds to grievances, and acts as the official City representative to nine employee bargaining units. Labor Relations assists Council in developing and executing bargaining strategies and helps bureaus comply with the City's labor agreements through management training and contract interpretation advice.

Employee and Labor Relations supports the City's goal to deliver efficient, effective, and accountable municipal services by planning thoughtful labor negotiation strategies, providing targeted management training, and increasing workforce productivity through performance management efforts. This program supports the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

Last fiscal year, the Bureau of Human Resources (BHR) identified three new performance measures for Employee Relations and Police HR. New performance measures include the total number of HR investigations, the number of days per HR investigation, and percentage of employees whose annual evaluation is conducted within one month of the anniversary date. Labor relations plans to implement formal performance measures related to the total number of interim successor agreement negotiations undertaken and the number of manager and supervisor training sessions offered.

The Employee Relations team supports the bureau's racial equity plan by providing the bias awareness training required for interview panels across the City. In addition, Employee Relations staff investigates all claims of discrimination and harassment throughout the City. Finally, each Human Resources Business Partner (HRBP) is familiar with their operating bureaus' affirmative action strategies and goals to help the bureaus achieve those goals.

The Labor Relations team supports the bureau's Racial Equity Plan by reviewing the City's nine Collective Bargaining Agreements and identifying opportunities to eliminate barriers and strategically partners with all City Bureaus to assure that all bureau policies, general orders, and directives are in line with the City's Racial Equity Plan.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of human resource investigations	0	165	N/A	157	150
Number of days per human resource investigation	0	54	N/A	51	48
Percentage of employees whose an annual evaluation within 1 month of anniversary date	0	N/A	N/A	80%	80%
HR Business Partner customer satisfaction	0	N/A	0	4	4

Explanation of Services

The Employee Relations team fosters excellence in employee performance and organizational effectiveness throughout the City by providing strategic consultation and support to improve

systems and the quality of decisions impacting people. Key services are noted below.

Learning and Capability Development
Assess, create, advise, and deliver on bureau-specific and Citywide employee training initiatives and HR related learning needs.

- Work with bureaus to create and implement talent development plans.
- Assess organizational capability needs and provide learning tools and programs that build workforce capability in support of City objectives.
- Deliver core as well as customized manager and employee training.
- Provide coaching and consultation for managers and supervisors on effective leadership practices.
- Deliver learning opportunities and programs to increase individual effectiveness and team performance.
- Develop, conduct, and/or coordinate tailored training on various HR related topics.

Performance Management
Provide consultation and tools to managers and staff to prevent and resolve workplace issues and facilitate workplace investigations as necessary.

- Aid in the development, implementation, and monitoring of the bureau's performance evaluation processes to ensure regular feedback is provided to staff.
- Perform workplace climate and culture assessments.
- Develop and deliver workforce engagement initiatives.
- Provide mediation, facilitation, and conflict resolution services to all employees.
- Conduct workplace harassment, discrimination, and retaliation investigations Citywide.
- Guide performance and conduct related investigations with bureau management.
- Assist in the administration of discipline and employee separations.

Change Leadership
Deliver consultative services and advice on how to plan, manage, and communicate initiatives and their impact to people and processes during organizational change.

- Partner with bureau leadership and BHR's Classification/Compensation division to facilitate reorganizations and redesigns.
- Assist in the implementation of collective bargaining agreement changes and their impact on City bureaus.
- Provide onboarding support for new City leaders and bureau directors.
- Advise on change management communication plans and culture change initiatives.
- Administer the City's layoff, recall, and redeployment processes Citywide.
- Administer the City's Targeted Severance program.

Interpretation and Navigation
Foster awareness, understanding, and compliance through coaching on administrative rules, collective bargaining agreements, employment laws, and workplace policies.

- Consultation and interpretation of HR Administrative Rules (HRAR) and partnering with Labor Relations on the interpretation and application of collective bargaining agreements.
- Facilitation of the City's Americans with Disabilities Act (ADA) accommodation process.
- Provide support on the resolution of early level grievances in coordination with Labor Relations.
- Guidance and approval on the use of process and forms.
- Recruitment and selection guidance on the use of NEOGOV, the delivery of offer letters, and the application of Veteran's Preference.
- Provide coaching and consultation to managers and supervisors regarding federal and state employment laws and regulations.

Employee Relations Team outcomes and results include:

- Assessing team climate and driving greater employee engagement.
- Accelerating the growth of new supervisors into strong people leaders.
- Designing and implementing assessment, succession, and development plans.
- Resolving employee performance, conduct, and workplace conflict issues.
- Defining talent acquisition and capability development strategies to meet future needs.
- Aligning HR initiatives to support bureaus' operational goals.
- Managing within the City's HRARs, employment laws, and collective bargaining agreements.
- Connecting employees with centralized BHR resources.
- Effectively communicating and managing the impacts of workplace change on staff.

Labor Relations Team outcomes and results include:

- Overseeing nine Collective Bargaining Agreements.
- Providing contract interpretation and administration.
- Negotiating interim and successor negotiations on behalf of the City.
- Serving as a liaison to resolve contract disputes through grievance, settlement, and arbitration support to City Attorney's Office.
- Working with bureau leadership on workforce planning that affects wages, benefits, and working conditions for all city employees.
- Providing training to management on new successor agreement, interim bargaining, and Public Employee Collective Bargaining Act (PECBA) in preparation for bargaining.
- Preparing bargaining strategies for Council approval.
- Providing program management for Civil Service Board, Commercial Driver's License/PPA Drug Testing Program.

Equity Impacts

The Employee and Labor Relations program benefits communities of color and persons with disabilities by working to provide access to employment as well as assist with identifying accommodations for City employees in accordance with ADA Title I.

Changes to Program

Prior to 2018, HRBPs were supervised by a team of three Site Team Managers who each coordinated their services and support to a small portfolio of offices and bureaus. In February 2018, the three decentralized Site Teams were converted into one centralized employee relations team led by one manager to improve communication with bureaus and to stay in line with best practices.

This change in structure allowed for a series of developments:

- BHR now provides centralized training to all HRBPs ensuring our HRBPs are skilled at industry best practices. New training modules are provided regularly with issues and concerns triaged and resolved quickly.
- Having a single manager allows for consistent coaching, systems, and accountability across all of Employee Relations.

BHR has since been able to streamline HR systems, which has led to the elimination of redundancies and shortened processing timelines for clients. The single manager structure allows BHR to monitor and strengthen quality of service with quick feedback loops.

Labor Relations charge to action has changed under new leadership within BHR. The team has adopted three goals to enhance relations with customers and stakeholders:

- Improve relationships with union leadership, elected officials, and City bureaus.
- Improve collaboration within Bureau of Human Resources.
- Provide effective labor training.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	23,000
Internal Materials and Services	0	0	0	5,053
Personnel	0	0	0	3,662,577
Sum:	**0**	**0**	**0**	**3,690,630**
FTE	0	0	0	25

Resources: This program is funded solely by General Fund discretionary resources. It is anticipated that program services will not be impacted by the one percent constraint reduction in General Fund revenues.

Expenses: Most costs associated with this program area are in personnel and are fixed.

Staffing: This program area has a total of 25 FTE.

Staffing trends within the HR generalist field are reflective of a tight labor market. The Employee Relations team has maintained a relatively stable workgroup but as the Portland Metro area continues to grow, HRBP roles will likely see increased turnover as a result of additional prospects in the market.

Staffing trends within Labor Relations continue to be a stable due to the competitive, specialized nature of this profession.

Assets and Liabilities: N/A

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Ron Zito
Website:	https://www.portlandoregon.gov/bhr/59984	**Contact Phone**	503-823-8910

BTS - Enterprise Business Solution

Program Description & Goals

Enterprise Business Solution (EBS) supports the City goal of delivering efficient, effective, and accountable enterprise technology services, and supports the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

EBS's performance is measured by customer service satisfaction ratings from customer feedback forms and the average length of time a HelpDesk ticket is open.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Customer service satisfaction rating number (scale 1 to 5)	4.93	2.70	N/A	3.00	N/A
Average number of days a SAP Helpdesk customer ticket is open	11.00	8.70	9.75	9.00	N/A

Explanation of Services

EBS manages the SAP application for the City and has a mission to deliver and support innovative, integrated, and cost-effective enterprise solutions to City customers.

EBS continuously revises its work plan to identify Citywide business needs and appropriate enterprise solutions to meet bureau needs. EBS works with customers to communicate opportunities to consolidate major systems including replacing the City's Learning Management System (LMS) with a robust SAP solution (SuccessFactors) that will also include employee onboarding and performance management modules. Additionally, EBS will be rolling out an Asset Management module and moving to the SAP cloud solution (HANA).

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

BTS base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20.

EBS continued refining and streamlining its organizational processes and efficiencies following the merger of the SAP technical and functional teams into a single program in BTS.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	20,000	400,000
External Materials and Services	876,574	994,892	2,126,210	3,451,304
Internal Materials and Services	4,718,725	5,211,485	5,390,080	437,029
Personnel	2,465,706	2,594,519	2,583,414	4,213,661
Fund Expense				
Contingency	0	0	4,709,482	2,793,516
Debt Service	3,036,800	0	0	0
Fund Transfers - Expense	178,322	177,290	184,653	0
Ending Fund Balance	3,968,813	5,142,852	0	0
Sum:	**15,244,940**	**14,121,037**	**15,013,839**	**11,295,510**
FTE	17	17	25	26

Resources: EBS services are supported through interagency revenues received from all City bureaus. Revenues received allow EBS personnel to maintain and expand the SAP system, providing 24x7 access for meeting the needs of all City bureaus.

Expenses: Primary expenses for the program are in personnel services, and external and material services (M&S). Maintaining, supporting, and upgrading the system is a highly labor-intensive process requiring skilled professionals within EBS, from outside vendors, and from interagency providers. All expenses are fixed and necessary as long as City personnel continue to desire an SAP system that is available and responsive to their needs.

Staffing: EBS staff is comprised of a program manager, training and development officer, business systems analysts, applications analysts, and information systems analysts.

Assets and Liabilities: The SAP system is this program's main asset. Existing interagency rates are sufficient to cover ongoing expenses as well as upgrades and expansion of the system.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

CAO - Facilities - Administrative & Support Services

Program Description & Goals

Facilities Administrative & Support Services houses management operations of OMF Facilities Services. This program houses the division manager who provides overall management of all other Facilities Services programs and positions which support the overall work of the other programs within Facilities Services.

Facilities Administration and Support Services is measured by a customer satisfaction score and an employee satisfaction score.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Average Facilities Services Customer Satisfaction score	0	N/A	0	3.00	4.00
Average Facilities Services Employee Satisfaction score	0	N/A	0	3.60	4.00

Explanation of Services

The Administrative & Support Services program provides general management and administration for all OMF Facilities Services' programs to ensure seamless building-related service provision to customer bureaus and tenants.

Equity Impacts

Facilities Services has adopted equity as one of its seven core values, and models equity throughout daily activities. Facilities demonstrates commitment to equity through the following activities:

- Active participation in the City's Prime Contractor Development Program (PCDP)
- Compliance with all applicable laws and City policies governing contracting with minority-owned businesses and community benefit agreements on large capital projects
- Focused minority outreach for position recruitments
- Creation of the FMT Apprenticeship and Utility Worker programs, which are intended to increase the representation of historically under-represented classes in the Facilities workforce
- Active participation in the OMF Equity Committee

Changes to Program

Over time, OMF Facilities Services anticipates an upswing in service demand related to security, janitorial, and operational functions within OMF managed facilities. Community members and tenants expect buildings to maintain functionality and be outfitted with modern technology. The rate of change in the workplace and in technology is increasing. Additionally, the City of Portland's workforce is increasing in size, increasing the amount of occupied space and requiring space efficiency measures throughout OMF buildings and leased spaces.

Two major projects within Facilities have spurred three new programs, which the bureau hopes to launch in FY 2019-20. The first is a Citywide Technology program which will include an enterprise approach to audio-visual equipment to support meetings, the implementation of a new room scheduling system which will allow city employees to more effective find, book, and manage meeting rooms across the City, and digital signage to better communicate with employees and the public on City services and information. The second program, is a new furniture program which will centralize furniture purchasing and management to allow more logistical movement and use, efficient pricing, and enhanced space planning to support an increased number of employees in the workplace. Lastly, a new security program includes an enterprise system that integrates security access, cameras, and duress into one collective system. A revamped approach to customer service will change the responsibility of Facilities within the Portland Building to ensure the public and the staff are adequately served. These additional programs may require increases in staff and training for the new systems and building management.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	78,324	79,572	46,020	44,997
Internal Materials and Services	1,472,524	1,837,832	946,687	1,752,566
Personnel	121,183	431,075	468,571	1,018,812
Fund Expense				
Contingency	0	0	-1,498,638	30,553,027
Fund Transfers - Expense	1,205,123	2,513,390	1,207,009	1,271,475
Sum:	**2,877,154**	**4,861,868**	**1,169,649**	**34,640,877**
FTE	1	3	3	5

Resources: The support services program is funded through Facilities Services Fund interest income, billable hourly rates, and the corporate rate charged to bureaus. In FY 2019-20 there are five separate hourly rates for project managers, supervisors, engineers, project specialists, dispatchers, facilities maintenance technicians (FMT), FMT apprentices, and utility workers.

Expenses: Primary expenses for this program include personnel services and the internal materials and services considered to be overhead for the hourly rates mentioned in the resources section above. The most notable expenses include services from the Bureau of Technology Services for ongoing support of the Enterprise Business Solution and the Facilities Services work order system, Facilities Center, insurance and workers' compensation, and management services from OMF Business Operations, Procurement, and the OMF Division of Asset Management.

Staffing: This program currently includes the Facilities Division Manager and three special programs employees.

Assets and Liabilities: There are no assets or liabilities associated with this program.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Kristin Wells
Website:	www.portlandoregon.gov/dam	**Contact Phone**	503-823-1869

CAO - Homelessness and Urban Camping Impact Re

Program Description & Goals

The Homelessness and Urban Camping Impact Reduction Program (HUCIRP) focuses on coordinated campsite cleanup in compliance with the Anderson Settlement agreement and works to educate the community on the nuances of homelessness. HUCIRP is responsible for coordinating cleanup of unsanctioned campsites on City properties/rights-of-way and manages the City's One Point of Contact reporting system. HUCIRP develops and implements harm/impact reduction strategies and is tasked with addressing public safety and livability issues occurring throughout the City in a coordinated manner. HUCIRP also facilitates service navigation opportunities for individuals experiencing homelessness and addresses health, safety, and livability concerns associated with encampments. Since HUCIRP's official inception in FY 2016-17, the number of cleanups has quintupled and cost per cleanup has fallen by 50%.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of campsite reports received and processed	0	N/A	0	29,000	N/A
Number of campsite cleanups performed	0	N/A	0	3,200	4,800
Total cleanup costs	0	N/A	0	$2,500,000	$1,875,000
Tons of garbage collected	0	N/A	0	2,000	3,500

Explanation of Services

The Citywide Coordinated Campsite Cleanup Program (CCCC) was developed in FY 2014-15 as a need was identified by property owning bureaus and City Council to centralize a coordinating entity to carry out campsite cleanup in compliance with the Anderson et. al. v. City of Portland settlement agreement. HUCIRP was created as the subsequent service to the CCCC to reduce the impact of unsheltered homelessness, trash, and bio-waste within the City of Portland. The program works collaboratively with both internal and external stakeholders to make referrals as well remove bio-hazards and trash within the public right-of-way. The program has a total of 3.0 FTE and oversees the work of four vendors.

Equity Impacts

HUCIRP's Mission: Working for all Portland community members to reduce the impact of unsanctioned urban camping within the City of Portland through responsive community education, collaboration, coordination with outreach providers, and risk mitigation.

HUCIRP's guiding principles include:

1) Recognizing and honoring the inherent value and worth in all humans regardless of economic status, ability, age, race, religion, sexual preference, or identity
2) Through harm reduction, reducing the impact of homelessness on housed and unhoused City of Portland residents, visitors, and commuters.
3) To effectively communicate the protected rights of unsheltered members of the community, the nuances of homelessness, jurisdictional authority, and the options available to our program for housed and unhoused Portland community members.
4) To cultivate transparent relationships with social service organizations.
5) Provide responsive, thorough, thoughtful, and equitable service to our internal and external partners.

Changes to Program

The program's budget has more than doubled since FY 2015-16 as the need to address unsanctioned urban camping has grown. In FY 2017-18 the program added 2.0 FTE for a total of 3.0 FTE – made of 1.0 program manager and 2.0 program coordinators. With these additions, the program focus has been on deploying a two-tiered intervention strategy with the use of Clean Start (CS PDX) first and then following up with Pacific Patrol Services (PPS) or Rapid Response Bio Clean (RR), enabling response to issues based on potential risks, as opposed to the number of reports generated.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	3,043,949	5,353,824
Internal Materials and Services	0	0	2,250	7,528
Personnel	0	814	626,615	956,241
Sum:	**0**	**814**	**3,672,814**	**6,317,593**
FTE	0	0	3	3

Resources: HUCIRP's funding structure is made up of ongoing cash transfers in the amount of $1 million each from the General Fund and Solid Waste Fund.

Expenses: Primary program expenses include time and material payments to vendors for campsite cleanup and salaries for 3.0 FTE. HUCIRP funds day storage operations and supports the development of alternative shelters in collaboration with the Joint Office of Homeless Services (JOHS). Additionally, the program rents a warehouse for storage space to store materials collected during campsite cleanup per the Anderson Agreement.

Staffing: The program has 3.0 FTE made up of 2.0 Coordinator I's and 1.0 Coordinator III. This staff level was achieved in FY 2017-18.

Assets and Liabilities: HUCIRP assumes Citywide liability for compliance with the Anderson Agreement and oversees the work of CS PDX, PPS, RR, and Multnomah County Sheriff's Office Inmate Work Crew in completing campsite cleanups. HUCIRP maintains a storage warehouse where items collected from camp cleanup activities are stored. HUCIRP has access to CityFleet's Vehicle Pool which enables the team to work in the field. HUCIRP purchased property for the development of alternative shelters on two public properties within the City. Additionally, this program owns two storage units, one located by the Steel Bridge downtown and the other by Hazelnut Grove in North Portland.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/toolkit

Program Contact: Lucas Hillier

Contact Phone 503-823-6930

CAO - Facilities - Operations & Maintenance

Program Description & Goals

Facilities Operations & Maintenance is responsible for building services and the repair and maintenance of OMF-owned facilities. This includes a wide variety of facilities including:

- The City's primary government buildings: City Hall, The Portland Building, and the 1900 Building
- Police Precincts and auxiliary facilities
- Critical facilities including the Portland Communications Center which houses the 911 call center, the Emergency Coordination Center, and the Jerome Sears building.

Additionally, Operations & Maintenance maintains facilities for other bureaus on a time and material basis, including:

- SmartParks and operations and maintenance facilities for the Portland Bureau of Transportation (PBOT)
- Office buildings, warehouses, and laboratories of the Bureau of Environmental Services (BES)
- Water Bureau support facilities and the Bull Run headworks
- Union Station on behalf of Prosper Portland
- Leased spaces

This program is measured by the yearly change in average energy use intensity, timeliness of customer workorder turnaround, percent completion of preventative maintenance compliance, and average maintenance cost per square foot of OMF-owned offices.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Change in average energy use intensity over the prior year average	0	N/A	0	-100%	-100%
Average customer demand workorder turnaround time	0	N/A	0	30	10
Percent of on-time preventive maintenance compliance	0	N/A	0	40%	80%
Average maintenance and operations cost per square foot	0	N/A	0	$14.50	$12.00

Explanation of Services

Services provided by Operations & Maintenance fall into three primary areas:

- Performance of corrective and preventive maintenance on all building systems including mechanical, electrical, plumbing, interior finishes, and exterior envelope
- Administration of portfolio-wide building programs including fire and life-safety systems, elevators, access control, security services, janitorial, and emergency backup power systems
- Tenant support in the form of requested services such as furniture adjustments, wall hangings, appliance trouble-shooting, and moving furnishings, equipment, and heavy objects

Equity Impacts

Facilities Services has adopted equity as one of its seven core values, and models equity in its daily activities. Facilities demonstrates its commitment to equity through the following activities:

- Active participation in the City's Prime Contractor Development Program (PCDP)
- Compliance with all applicable laws and City policies governing contracting with minority-owned businesses and community benefit agreements on large capital projects
- Focused minority outreach for position recruitments
- Creation of the FMT Apprenticeship and Utility Worker programs, which are intended to increase the representation of historically under-represented classes in the Facilities workforce
- Active participation in the OMF Equity Committee

Changes to Program

OMF Facilities Services anticipates an increased demand for secure, clean, comfortable, and healthy work environments. Customer bureaus continue to increase workforce and additional locations are being added to Facilities Services' portfolio.

Operations & Maintenance anticipates a need for additional resources to administer the asset management program, meet new service offerings within the reconstructed Portland Building, and to meet demands of client bureaus. In coming years, Operations & Maintenance anticipates additional investment in a replacement workorder system.

Operations & Maintenance is employing new technologies, including Smartsheet and Tableau, to streamline business processes, enhance customer experiences, and enable data-driven decision making. Operations & Maintenance increased staff during the Fall Budget Monitoring Process to address understaffing which has resulted in delayed maintenance. Operations and Maintenance will seek permanent funding for those positions.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	0
External Materials and Services	15,905,712	15,191,713	27,128,356	25,696,557
Internal Materials and Services	1,705,075	2,023,964	2,872,026	3,178,284
Personnel	2,808,601	3,082,513	4,274,490	3,533,309
Fund Expense				
Contingency	0	0	22,590,943	0
Debt Service	0	0	0	2,863,807
Fund Transfers - Expense	0	0	0	0
Sum:	**20,419,388**	**20,298,190**	**56,865,815**	**35,271,957**
FTE	25	27	30	33

Resources: Operations & Maintenance is supported by rental rates charged to tenant bureaus, direct billings, and the Corporate Services charge.

Expenses: Primary expenses for this program include personnel, utilities, repair and maintenance supplies and services, and contracted services for security, janitorial services, and other miscellaneous services.

Staffing: Operations &Maintenance employs 30 personnel including a manager, supervisor, dispatchers, licensed Facilities Maintenance Technicians (FMTs), Apprentices, Utility Workers, and a building services Program Manager. Aside from the addition of two Utility Workers and a FMT Apprentice over the last few years, Operations & Maintenance staffing has remained unchanged for many years.

Assets and Liabilities: Operations & Maintenance maintains 16 OMF-owned buildings with a replacement value of approximately $500 million. Building maintenance follows industry best practices. However, understaffing over years has resulted in preventative maintenance falling behind and historic underfunding of major maintenance reserves has caused a challenge to maintain buildings optimally. Without significant additional investment in major maintenance funding and staffing, the condition index of the portfolio is expected to continue declining. Facilities has undertaken a multi-year process to develop this further into a formal asset management program, to increase major maintenance funding to a sustainable level.

Liabilities include debt service for the Emergency Coordination Center, the City Archives Center, the Police Training Center, the Portland Building, and the 4th and Montgomery Building.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Tim McCormack
Website:	www.portlandoregon.gov/dam	**Contact Phone**	503-823-6940

CAO - Facilities - Capital Projects

Program Description & Goals

Facilities Capital Projects manages all manner of capital projects including major maintenance, component replacement, renovation, and new construction projects. These are funded by a variety of sources, including major maintenance funds, General Fund capital set-aside, customer bureaus, and bond financing. Facilities Capital Projects' primary mission is to provide project management services for projects related to 16 OMF-owned buildings, including:

- The City's primary government buildings: City Hall, the Portland Building, and the 1900 Building
- Police Precincts and auxiliary facilities
- Critical facilities including the Portland Communications Center housing the 911 call center and the Emergency Coordination Center
- Jerome Sears building
- New construction including the 4th & Montgomery building

Additionally, the team manages projects for customer bureaus' facilities on a time and materials basis, including:

- SmartParks and Operations & Maintenance facilities for the Bureau of Transportation (PBOT)
- Office buildings, warehouses, and laboratories of the Bureau of Environmental Services (BES)
- Water Bureau support facilities and the Bull Run headworks
- Union Station on behalf of Prosper Portland
- Space planning studies
- Leased spaces

Facilities Capital Projects is measured by the percentage of projects completed on time and the percentage of projects completed under budget.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of construction projects completed on-time	0	N/A	0	80	90
Percentage of construction projects completed under budget	0	N/A	0	80%	90%

Explanation of Services

The team manages projects that generally fall into the following categories:

- Major maintenance and component replacements for primary building systems including mechanical, electrical, plumbing, fire and life-safety systems, elevators, security systems, and emergency backup power systems
- Architectural elements such as interior finishes, exterior envelopes, and tenant improvements
- New construction and building renovations

Equity Impacts

Facilities Services has adopted equity as one of its seven core values, and model's equity throughout daily activities. Facilities demonstrates commitment to equity through the following activities:

- Active participation in the City's Prime Contractor Development Program (PCDP)
- Compliance with all applicable laws and City policies governing contracting with minority-owned businesses and community benefit agreements on large capital projects
- Focused minority outreach for position recruitments
- Active participation in the OMF Equity Committee

Changes to Program

Over time, OMF Facilities Services anticipates an upswing in service demand related to security, janitorial, and operational functions within OMF managed facilities. Community members and tenants expect buildings to maintain functionality and be outfitted with modern technology. At the same time, building major maintenance funding has remained at a level that is inadequate for sufficient building maintenance. This has resulted in an estimated $25 million backlog of major maintenance, component replacement, and seismic (structural and non-structural) remediation. Additionally, Portland's construction market is at an all-time high, which has presented shortages in the workforce and increased costs among capital projects.

Capital Projects is anticipating new investment in major maintenance in the near future. An increase in funding will require additional construction project management resources.

Capital Projects is employing new technologies, including Smartsheet and Tableau, to streamline business processes, enhance customer experiences, and enable data-driven decision-making.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	1,331,217	14,042,352	100,917,342	61,878,246
External Materials and Services	11,687,520	25,725,660	17,951,275	13,479,787
Internal Materials and Services	351,980	511,621	1,028,886	390,114
Personnel	705,700	1,146,981	645,054	1,148,149
Fund Expense				
Contingency	0	0	-590,440	13,796,456
Debt Service	59,331	305,011	3,762,674	6,398,132
Fund Transfers - Expense	0	0	0	133
Sum:	**14,135,748**	**41,731,625**	**123,714,791**	**97,091,017**
FTE	5	5	6	6

Resources: This program is primarily supported by billable hourly rates to building location budgets, and other City bureaus for billable services. Funding for capital projects is derived from a number of sources including major maintenance reserves, general fund capital set-aside, customer bureaus, and bond financing.

Expenses: Primary expenses for this program include personnel and project costs such as professional, technical, and expert consultants, construction, and miscellaneous services. Internal expenses for components of projects are often incurred from the Bureau of Technology Services, the Bureau of Environmental Services, the Bureau of Transportation, and the Bureau of Development Services for permitting and logistics.

Staffing: The Capital Projects team is comprised of a supervising construction project manager and eight construction project managers and specialists.

Assets and Liabilities: There are no assets or liabilities associated with this program.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Ron Umali
Website:	www.portlandoregon.gov/dam	**Contact Phone**	503-823-6947

CAO - Facilities - Property Management & Real Estate

Program Description & Goals

The Facilities Property Management & Real Estate Services team provides property acquisition and leasing, and property management services to City bureaus.

This program is measured by the average occupancy rate for all rentable spaces under the management of this program.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Average occupancy rate	0	N/A	0	95%	98%

Explanation of Services

This team includes one licensed real estate professional and two real estate specialists. The team consults with clients to understand their real property needs and provide in-house and contracted property search and brokerage services. The team also manages approximately 150 leases, including leases to provide additional space for City bureaus, inter-bureau leases, and leases of retail and commercial space in City buildings to other private or public-sector clients. Workload includes negotiating and managing lease agreements, researching property and rental markets, collecting rents, and responding to tenant requests or concerns. The team also provides real property sales and purchasing services.

Equity Impacts

Facilities Services has adopted equity as one of its seven core values, and models equity throughout daily activities. Facilities demonstrates commitment to equity through the following activities:

- Active participation in the City's Prime Contractor Development Program (PCDP)
- Compliance with all applicable laws and City policies governing contracting with minority-owned businesses and community benefit agreements on large capital projects
- Focused minority outreach for position recruitments
- Active participation in the OMF Equity Committee

Changes to Program

The City of Portland is growing and with it, the number of City employees which need supportive working locations which meet the needs and requirements of their work functions. As a result, the Property team is increasing in the number of managed leases. Purchase and sale of properties are increasing as well. Additionally, the new projects coming online in FY 2019-20 will generate new leases for those buildings and the retire existing leases where those bureaus are currently tenants.

There are no anticipated changes to organizational structure or resources.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	215,999	0	0	
External Materials and Services	2,060,267	3,371,019	585,787	100,000
Internal Materials and Services	181,636	147,383	233,215	235,176
Personnel	367,120	427,348	258,542	409,166
Sum:	**2,825,022**	**3,945,750**	**1,077,544**	**744,342**
FTE	5.92	5	3	3

Resources: The Property Management Program is supported by billable hourly rates to customers and locations requesting their services, and a small portion of rental income from some commercial tenants.

Expenses: Primary expenses for this program include personnel and miscellaneous services such as outside brokerage services.

Staffing: This program includes 3 FTE.

Assets and Liabilities: There are no assets or liabilities associated with this program.

Program Information

Bureau: Office of Management & Finance

Website: www.portlandoregon.gov/dam

Program Contact: Pauline Goble

Contact Phone 503-823-6018

CAO - CityFleet New & Replacement Acquisitions

Program Description & Goals

The CityFleet Acquisition Team, in collaboration with bureau partners, is responsible for the replacement of approximately 700 distinct types of vehicles and specialized equipment. The acquisition team is also responsible for the disposal of vehicles at the end of their economic life cycle via public auction.

Acquisitions also manages the following processes: lease and rental equipment, new vehicle outfitting and processing, vehicle disposal, and providing vehicles with GPS units. The 2015 Climate Action Plan requires 20% of the sedan class to be operated by electric or plug-in hybrid by the end of 2020. CityFleet has surpassed this goal and is currently at 44%. The FY 2019-20 electrification goal is targeted at 47% with 50% targeted for FY 2020-21.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of sedans that are electric or plug-in hybrid	39%	44%	44%	47%	50%
Percentage change in sedan class unleaded fuel use over the prior year	-5.00%	4.20%	-.50%	-.50%	-.50%

Explanation of Services

CityFleet is responsible for managing the City's vehicle and equipment replacement fund in a fiscally responsible manner. The City receives significant discounts on the purchase of vehicles and equipment through state and national level contracts awarded in a competitive bid process.

Vehicle life cycles are calculated using cost analysis data to identify the ideal time in the economic life cycle for replacement. Considering the age, mileage, and a mechanical assessment maximizes the use and resale of vehicles and equipment while keeping the operation and maintenance of vehicles and equipment at a minimum.

Equity Impacts

CityFleet has a long-term goal of addressing racial equity and inclusion throughout the division's identity and culture. The New and Replacement Acquisitions Program supports this commitment through the 2017 City of Portland Electric Vehicle Strategy which creates mobility solutions that are equitable and empowering. Per the 2015 Climate Action Plan and Bureau of Planning and Sustainability's 2017 City of Portland Electric Vehicle Strategy, it has been determined that low-income populations and communities of color suffer disproportionally from vehicle-related air pollution. The CityFleet Motor Pool Program goals for reducing carbon emissions positively impact communities of color and lower incomes by improving air quality throughout the city.

Changes to Program

Portland's Climate Action Plan specifies a goal to reduce transportation carbon emissions by 25% by 2020 and 40% by 2030. Additionally, Portland's Electric Vehicle Strategy ensures that the use of CityFleet sedans contributes to reducing carbon emissions, improving air quality, decreasing maintenance and operating costs, and increasing electric vehicle exposure to the public.
Specific Climate Action Plan and EV Strategy Objectives that will impact the New and Replacement Acquisitions Program:

- Increase Fuel Efficiency of passenger vehicles to 40 miles per gallon
- Reduce Lifecyle Carbon Emissions of transportation fuels by 20%
- Reduce Carbon Emissions from City operations by 53% from fiscal year 2006-07 levels
- City EV Purchasing, Establishment of "electric first" purchasing policies that guide City Bureaus toward all-electric purchases when the use is consistent with available light duty vehicles.
- Clean Fuels Credits, which will become a credit generator in the Oregon Clean Fuels Program for City owned chargers.

CityFleet has met the one percent budget constraint through vacancy savings and improving efficiencies to continue current service levels.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	10,960,013	10,022,820	20,539,368	7,743,326
External Materials and Services	2,473,184	2,921,638	1,209,270	2,093,563
Internal Materials and Services	-103,404	-180,548	0	0
Personnel	1,167,615	1,039,831	1,012,607	934,512
Fund Expense				
Contingency	0	0	5,244,592	13,215,860
Debt Service	0	0	65,332	60,420
Fund Transfers - Expense	378,085	0	7,970	10,058
Sum:	**14,875,493**	**13,803,741**	**28,079,139**	**24,057,739**
FTE	9.2	8.55	8.6	7.2

Resources: This program is funded through interagency agreements with bureaus. The program includes the purchase of new and replacement vehicles, vehicle outfitting, coordination and installation of GPS units, and vehicle and equipment rentals and leases for bureaus. Costs for this program are recovered through markups on leases, GPS, and replacement and outfitting billings. The program also charges a replacement rate on vehicles to fund the cost of replacing vehicles at the end of their useful life.

Expenses: Primary expenses for this program include personnel and materials and services.

Staffing: This program contains 7.2 FTE

Assets and Liabilities: Excluding vehicles owned by the Water Bureau, the Bureau of Environmental Services, and Portland Fire & Rescue apparatus, all City vehicles are assets of the CityFleet Fund. Funds are collected to replace the vehicle and equipment when it has met its useful life.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Michael Roy
Website:	https://www.portlandoregon.gov/dam/33474	**Contact Phone**	503-823-4302

CAO - CityFleet Maintenance and Repair

Program Description & Goals

CityFleet maintenance and repair provides professional and technical municipal fleet vehicle services for approximantely 3,600 units including 700 distinct types of vehicles and specialized equipment. Key services include maintenance and repair, parts acquisition, fuel station management for seven mission critical stations, and collision repair. The services are provided at seven maintenance facilities in addition to emergency roadside response. CityFleet is also responsible for end-of-lifecycle equipment decommissions.

Through high quality and technically skilled service delivery, CityFleet supports the City's goals of delivering efficient, effective, and accountable municipal services and the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of vehicles meeting industry utilization standards	91%	97%	95%	92%	90%

Explanation of Services

CityFleet provides quality and timely preventive maintenance and repair to 3,300 different pieces of equipment ensuring that City bureaus are able to deliver important services to the residents of Portland.

Dedicated and Specialized Service. CityFleet provides City bureaus access to seven repair and maintenance facilities throughout the City. The technicians perform preventive maintenance, diagnosis, and repair on City-owned equipment. This results in greater equipment availability and reduced loss of production time so that Portland residents experience quicker completion on projects and work performed by our customer bureaus.

Quality and Efficient Fleet Maintenance. CityFleet provides a comprehensive preventive maintenance program to maximize vehicle and equipment availability and reduce repair costs. Other services provided are DEQ emission inspections, advanced diagnosis and repair of the continuously evolving technology and computer systems, and all other vehicle systems such as engines, transmissions, drive-trains, suspensions, HVAC, and brakes.

A Reliable and Healthy CityFleet. City bureaus rely on CityFleet services to keep fleet equipment in safe and mechanically sound operating condition. This allows for better bureau project planning and completion. Ultimately, CityFleet serves Portland residents by ensuring that required services are completed with the safest, most cost effective, environmentally responsible equipment possible. The division also recognizes its responsibility to the environment and applies a "green" lens to all of its work.

Equity Impacts

CityFleet is an internal-facing program in which City bureaus are the direct customers. The area in which CityFleet Maintenance and Repair has the greatest impact on equity is through advancing equity goals through recruiting and hiring a talented and diverse workforce.

Changes to Program

When technology evolves, so does CityFleet.

The greening of fleets: Climate change, harmful environmental effects of fossil fuels, and sustainability goals are a few of the driving forces behind the greening revolution. CityFleet's business approach is continuously evolving as alternative fuels and fueling systems are developed and introduced.

Refocused Training: As each new type of fuel system is introduced, CityFleet invests in training to assure that its technicians are kept informed and up to date. For example, in support of the "Poop to Power" initiative led by the Bureau of Environmental Services, technicians were trained on Compressed Natural Gas (CNG) tank certification, system maintenance, and repair.

CityFleet has met the one percent budget constraint through vacancy savings and improved efficiencies to continue current service levels.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	106,239	264,564	3,420,616	3,534,338
External Materials and Services	9,493,791	10,534,565	13,699,524	12,312,159
Internal Materials and Services	1,992,725	2,401,806	2,538,727	2,359,699
Personnel	6,744,603	6,883,173	7,956,934	8,028,657
Fund Expense				
Contingency	0	0	1,841,136	4,312,695
Debt Service	119,749	119,749	558,573	701,709
Fund Transfers - Expense	671,191	1,098,181	1,262,423	1,174,018
Sum:	**19,128,298**	**21,302,038**	**31,277,933**	**32,423,275**
FTE	67.8	68.45	69.4	70.5

Resources: The primary resources that support this program are interagency agreements with other City bureaus and intergovernmental agreements with external customers for services provided on a time and materials basis. CityFleet charges an hourly rate to bureaus when services are requested as part of an interagency agreement. CityFleet also applies a mark-up on vended work and parts and fuel for the staff time required to order and inventory these materials and services. The program relies entirely on billings for services provided to bureaus. It has no fixed revenue source.

Expenses: The primary expenses for the program include personnel costs, materials, and services to repair and maintain vehicles. Fund level expenses and administrative costs for CityFleet are included in the Maintenance and Repair program.

Staffing: CityFleet's vehicle mechanics are allocated to the repair and maintenance program full-time. There are several operational staff that allocate part of their time to the repair and maintenance program as well.

Assets and Liabilities: The program's major assets are its main Kerby Garage and six satellite locations around the City. Maintenance on the Kerby Garage has been deferred and the facility can no longer meet the needs of the program. A study is in place to address how best to address CityFleet's facility needs. CityFleet manages seven fuel stations. Five of these stations need to be replaced. CityFleet has a capital program to replace these stations and construct new stations at the Jerome Sears facility in SW Portland and one on the eastside. The program is in the process of contracting with a vendor for four replacements and work is projected to occur in Summer 2019. The construction of the two new facilities will occur when the overall use of the Jerome Sears facility has been determined and a plan for an east side facility is developed.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Michael Roy
Website:	www.www.portlandoregon.gov/dam/33474	**Contact Phone**	503-823-4302

CAO - CityFleet Motor Vehicle Pool

Program Description & Goals

Portland's CityFleet Department operates a motor vehicle pool available to all City employees. The vehicle pool is designed to meet short-term transportation needs for various customers while maximizing the use of the vehicles. The performance of the vehicle pool is measured by monitoring vehicle use compared to industry standards, and by achieving City carbon emission reduction goals.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of vehicles meeting industry utilization standards	91%	97%	95%	92%	90%
Percentage of sedans that are electric or plug-in hybrid	39%	44%	44%	47%	50%
Percentage change in sedan class unleaded fuel use over the prior year	-5.00%	4.20%	-.50%	-.50%	-.50%

Explanation of Services

CityFleet is responsible for providing safe, reliable, cost-effective, and compliant transportation services that support City functions requiring vehicles and equipment. The motor pool exists to provide transportation solutions to bureaus, divisions, departments, and individuals that require occasional use.

The vehicle pool consists of 32 vehicles, including bicycles, sedans, minivans, and compact pickups. Vehicle pool use is monitored through the Key Valet software application which is used for scheduling and reporting reservations. All other motor pool vehicle performance measures including utilization, vehicle type (e.g., hybrid and electric), and fuel types are tracked through the Fleet Anywhere vehicle management software.

Equity Impacts

CityFleet has a long-term goal of addressing racial equity and inclusion throughout the division's identity and culture. The New and Replacement Acquisitions Program supports this commitment through the 2017 City of Portland Electric Vehicle Strategy which creates mobility solutions that are equitable and empowering. Per the 2015 Climate Action Plan and Bureau of Planning and Sustainability's 2017 City of Portland Electric Vehicle Strategy, it has been determined that low-income populations and communities of color suffer disproportionally from vehicle-related air pollution. The CityFleet Motor Pool program goals for reducing carbon emissions positively impact communities of color and lower incomes by improving air quality throughout the city.

Changes to Program

Portland's Climate Action Plan specifies a goal to reduce transportation carbon emissions by 25% by 2020 and 40% by 2030. Additionally, Portland's Electric Vehicle (EV) Strategy ensures that the use of CityFleet sedans contributes to reducing carbon emissions, improving air quality, decreasing maintenance and operating costs, and increasing electric vehicle exposure to the public.

Specific Climate Action Plan and EV Strategy Objectives that will impact the vehicle pool program:

- Increase Fuel Efficiency of passenger vehicles to 40 miles per gallon
- Reduce Lifecyle Carbon Emissions of transportation fuels by 20%
- Reduce Carbon Emissions from City operations by 53% from FY 2006-07 levels
- City EV Purchasing: Establishment of "electric first" purchasing policies that guide City bureaus toward all-electric purchases when the use is consistent with available light-duty vehicles
- Clean Fuels Credits, which will become a credit generator in the Oregon Clean Fuels Program for City-owned chargers

CityFleet has met the one percent budget constraint through vacancy savings and improving efficiencies to continue current service levels.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	51,854	97,165
Internal Materials and Services	71,894	73,481	0	0
Personnel	0	0	0	32,394
Fund Expense				
Debt Service	0	0	0	2,117
Fund Transfers - Expense	3,364	0	0	352
Sum:	**75,258**	**73,481**	**51,854**	**132,028**
FTE	0	0	0	0.3

Resources: The motor vehicle pool is funded by interagency agreements with City bureaus. Users are charged the hourly or daily rate based on the length of their reservation for the vehicle.

Expenses: Primary expenses to run the program include personnel services, repair and maintenance, accident insurance, and expenses to run the Key Valet software application. Funds are also used for future vehicle replacements.

Staffing: Staff members provide support in three main areas of the operation: point of use customer service, hardware and software technical support, and monthly billing to the end user.

Assets and Liabilities: The motor vehicle pool consists of 32 vehicles including bicycles, sedans, minivans, and compact pickups. These vehicles are on a replacement plan scheduled when the vehicle is no longer operational or has depreciated past its life expectancy.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Michael Roy
Website:	https://www.portlandoregon.gov/dam/47985	**Contact Phone**	503-823-4302

BRFS - Grants Management

Program Description & Goals

The Grants Management Division is responsible for the management and oversight of all incoming federal, state, private grants, and outgoing Special Appropriations grants and contracts.

The goals of the Grants Management Division are to minimize the City's potential financial liability with respect to allowable costs, work to eliminate audit findings by grantors and auditors, maximize the City's cash flow from grantors, provide transparency for outgoing grants, and prepare the City's federally required Single Audit Report.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of grant audit findings	0	N/A	0	0	0

Explanation of Services

The Grants Management Division was created to minimize the City's potential financial liability and comply with all grant regulations and requirements. By maintaining oversight of federal programs and having minimal audit findings, the City continues to be considered a low-risk grantee. Maintaining a low-risk grantee status can result in continued federal funding and fewer audit requirements.

Services include:

- Serving as a technical resource for bureau staff in preparing and submitting grant applications and grant ordinances
- Maintaining grant information in SAP, submitting expenses to grantors for reimbursement, and preparing required grant financial reports
- Maintaining an administrative and monitoring system that ensures bureaus perform in accordance with the terms, conditions, and specifications of their grants, and that all Progress and Financial Reports are completed and submitted on time
- Ensuring bureaus develop monitoring programs for their sub-recipients
- Preparing the City's annual Schedule of Expenditures of Federal Awards (SEFA)
- Managing the City's Special Appropriations Program that awards grants to external organizations
- Serving as the City's lead for funding associated with federal disaster declarations

Equity Impacts

The Grants Management Division assures Citywide compliance of federal regulations related to equity. Day-to-day operations of grants is managed by bureaus and the program-specific equity impacts will be reported with bureau grant budgets and Special Appropriations program budgets.

Changes to Program

In FY 2017-18, GMD created an OSS-III to help address the growing workload of the division due to Special Appropriations and the implementation of the City's 1% for Community Opportunity and Equity Program (COEP). Special Appropriations assignments were distributed across the team and the OSS-III was to be dedicated to supporting the COEP Program. Due to uncertainty in the management of the COEP program, the OSS-III was not filled immediately and a temporary Community Services Aide was hired to assist with the program workload. Separately, GMD conducted a staffing & workload analysis which showed Special Appropriations workload exceeded the resources originally allocated to the Division for this work in FY 2016-17 by approximately 1.0 FTE due to significant program growth. Given a recent decision that the majority of responsibility for COEP program administration would move to Prosper Portland, and rather than requesting general fund resources, GMD has budgeted administrative fees across the Special Appropriations and other similar programs assigned to the division to address this workload need.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	32,759	20,186	97,626	22,402
Internal Materials and Services	56,085	64,034	72,380	75,052
Personnel	627,724	683,450	757,959	906,417
Sum:	**716,568**	**767,669**	**927,965**	**1,003,871**
FTE	5.15	5.82	6.17	6.36

Resources: This program offer is funded through General Fund resources.

Expenses: A sizable percentage of the budget supports staff with a small percentage of external and internal materials & services, which includes a training allocation for staff.

Staffing: The net result of the "Changes to Resources" described above is that staffing levels will remain static in FY 2019-20. The seventh FTE reported in the table for 2019 is the CFO, who in that budget year was reflected as part of this division.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Management & Finance **Program Contact:** Sheila Craig

Website: portlandoregon.gov/brfs **Contact Phone** 503-823-6863

BHR - Total Rewards

Program Description & Goals

This program includes the administration of the City of Portland's Total Rewards program encompassing administration of healthcare, life and disability coverage, leave programs, occupational health and wellness, deferred compensation, and other financial services for City employees. The Health Insurance Fund collects revenue and pays expenses incurred for medical, dental, vision, and prescription drug claims, claims administration, internal administration, chronic disease management, and stop-loss insurance for the self-funded plans CityCore, CityBasic, and City Net (for Portland Police Association (PPA) members). The Health Insurance Fund also administers dental programs, COBRA enrollees, retirees, and casual employees who gain access to coverage through the Affordable Care Act or a collective bargaining agreement. The Health Insurance Fund also collects and pays costs associated with the insured programs (e.g., Kaiser medical/dental/vision, life insurance, and disability programs). This fund is separate from the PPA Health Fund. The PPA Health Fund administers claims and premiums on behalf of sworn employees of the Police Bureau who are members of the PPA, retirees of the PPA, COBRA enrollees, or eligible dependents of a PPA member. The Total Rewards program oversees the Citywide classification and compensation plans, programs, policies, and systems, and supports labor contract negotiations through compensation and market analysis. The Total Rewards program includes the City's Occupational Health and Well-being program. This program assesses the needs for education and services supporting employees focusing on improving safety, minimizing risk, and improving overall well-being. This program is responsible for employee support and counseling, coordination of the City's flu shot clinic, blood borne pathogen training, and provides consultant services related to the Healthy Foundations and CityStrong program. To best support the City's Employer Branding Initiative, key performance measurements will assess employee perception of the Total Rewards Program. In June 2018, City employees were surveyed to determine their knowledge and satisfaction of employee benefits. Of those employees who responded, 69% felt the benefits program was a key factor in opting to work at the City while 84% felt it was a reason to stay with the City. While retention is important, potential employees need to understand the Total Rewards benefits available to them as employment options are evaluated. Continued success will require improved collaboration with BHR's Workforce Recruitment and Training division, outreach to targeted recruitments as they begin the interviewing process, and strategies involving existing employees to champion work and experiences.

Classification and Compensation plans to implement benchmark performance measurements in the future. Employees in this division will finalize components of the classification/compensation study and be surveyed during this process to ensure future performance metrics can be offered. The Total Rewards Program supports the Bureau's five-year Equity Plan by offering employees low premium share and affordable access to healthcare, continual improvements to pay equity, and classification alignment across non-represented job classifications. Continued work needs to be done to implement consistent exit interview practices and flexible work schedules to better meet the cross generational needs of City employees.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of employees enrolled in health coaching programs	547	612	680	838	879

Explanation of Services

The Total Rewards program leads the City's Employer Branding initiative which identifies the City as a value-based employer to attract, develop, and retain a diverse, culturally competent, and engaged workforce. This work is supported by the Champions Circle, a committee of employees representing a cross section of bureaus, who proactively engage and support City bureaus in the implementation of the Employer Branding initiative. Total Rewards is responsible for leading the following Citywide initiatives that support Employer Branding:

- Citywide onboarding
- Path to Leadership training
- Web-based and classroom trainings
- Employee wellness programs
- Talent development and mentorship programs

The Total Rewards Program provides support to Council, bureaus, and employees. The benefits program supports employee wellness, financial well-being, leave administration, work life balance, and employee safety, and includes the administration of software systems and communications supporting benefit plan participants.

Classification and Compensation (Class/Comp) develops and manages the City's job classification and compensation plans and system by ensuring the City has a consistent methodology for classifying jobs from a Citywide perspective. Proper alignment of job classifications provides a competitive advantage in marketing the City as an employer and allows the City to recruit and retain employees by offering competitive wages and opportunities for career advancement. Class/Comp serves to create equity in compensation and ensure market competitiveness.

Equity Impacts

As part of the Employer Branding Initiative, the Total Rewards Program works to benefit all employees, specifically employees within communities of color and persons living with disabilities. Healthcare vendor partners are encouraged to establish comprehensive information on network providers, ensuring employees can find healthcare providers by gender, race, and other specialties (e.g., LGBTQ, language). When availability deficiencies are discovered, BHR vendor partners work to recruit and contract with additional providers to improve access.

Changes to Program

Classification and Compensation, healthcare, employee wellness, and leave programs reside within the Total Rewards program. These programs are not impacted by the reallocation of resources and will not be impacted by the one percent constraint requirement. Additional resources may be needed to achieve initiatives that build and brand the City of Portland as an employer. Combining all programs under one umbrella provides a comprehensive perspective on how these services are offered Citywide.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	1,000,000	128,355,487
Internal Materials and Services	0	0	50,000	444,252
Personnel	0	0	100,000	3,007,994
Fund Expense				
Contingency	0	0	-1,150,000	31,567,788
Debt Service	0	0	0	45,660
Fund Transfers - Expense	0	0	0	286,954
Sum:	**0**	**0**	**0**	**163,708,135**
FTE	0	0	0	20.42

Resources: As described in the Program Description and Goals, the healthcare programs are overseen by separate operating funds. For FY 2019-20, the City anticipates an aggregated increase to healthcare costs of 5.5%.

Expenses: The primary expenses of this program are medical claims expenses. Expenses are paid for employees through premium costs paid to Kaiser for insured plans and through claims utilization under the self-funded plans. Expenses are fixed each fiscal year through a rate setting process based upon prior years' experience, enrollment, utilization, trend, and inflation.

Staffing: The Total Rewards program has 20.42 funded positions. 1.52 FTE are within the Deferred Compensation program, 1.0 FTE supports the occupational health and well-being program. 2.0 FTE support the Citywide leave program. Additional positions support Health Benefits and Classification and Compensation. Program costs unrelated to healthcare administration are funded through General Fund resources and the Deferred Compensation budget.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Management & Finance **Program Contact:** Cathy Bless

Website: portlandoregon.gov/bhr **Contact Phone** 503-823-5207

BTS - Information Security

Program Description & Goals

Information Security deploys safeguards required to properly protect the City's information assets. Information Security supports the City's goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

Program performance is measured by the effectiveness of the Information Security program in protecting the City's technology environment from security threats, including the ability to accept security patches in 97% of all City workstations. The program has a strategic target to achieve 99% in FY 2019-20.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of computers (workstations and servers) able to accept security patching	97%	99%	97%	100%	99%

Explanation of Services

Information Security ensures the confidentiality, integrity, and availability of all City data and communications systems and assets.

The responsibilities of this program are to develop and measure compliance with information policies and procedures and to minimize risk through implementation of effective technical, administrative, and physical security controls.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

BTS's base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20.

Information Security has not experienced significant organizational changes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	62,679	925,000	
External Materials and Services	683,918	791,196	1,861,725	2,719,800
Internal Materials and Services	40,407	39,894	29,677	43,180
Personnel	754,877	710,007	746,953	785,502
Sum:	**1,479,202**	**1,603,776**	**3,563,355**	**3,548,482**
FTE	4	4	4	4

Resources: The Information Security program benefits all City bureaus by safeguarding the City's information assets. A Corporate Services appropriation provides resources needed to support the Information Security program and other BTS functions. As Information Security provides a vital role in the City's ability to provide safe and reliable technology services, the resources are stable and reliable.

Expenses: The program's primary expenses in external materials and services where hardware, software, licensing, and support costs are incurred. By coordinating the work of the City's Information Security staff with the services provided by vendors, BTS is able to keep its information systems current with everchanging IT standards.

Staffing: Information Security includes a Chief Information Security Officer and three Information Security Architects.

Assets and Liabilities: Information Security has some hardware and software assets. Due to the nature of technology and how rapidly it changes, assets are constantly reevaluated to assess their effectiveness in the current environment. Information Security has nine ongoing projects, with additional projects planned for FY 2019-20. Upon completion, Information Security projects will further support and upgrade assets needed to continue safeguarding the City's information.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BHR - Operations and Strategic Support

Program Description & Goals

Operations and Strategic Support consists of two functions including the Human Resources (HR) and Payroll Services group and the Strategic Support group. Strategic Support provides bureau oversight and direction, develops and maintains the City's Administrative Rules and policies, provides consultation to bureau directors and City Council, manages the bureau's budget, and oversees and administers the pre-employment medical programs. HR and Payroll Services manages, administers, and coordinates the City's human resources and payroll systems. Program tasks include oversight of position management systems, personnel administration, payroll, and time administration programs within SAP Human Capital Management (HCM) and the contract for the child development center (CityKids).

The Operations and Strategic Support program supports the City's goal of delivering efficient, effective, and accountable municipal services and the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

The HR and Payroll Services program strives to provide and administer efficient systems and business processes that support management and payment processes for the City's workforce and third-party fund recipients. HR and Payroll Services complies with federal, state, and local wage and hour laws, labor contracts, administrative rules, and business requirements. Emerging case laws are incorporated into system requirements.

HR and Payroll Services continuously incorporates feedback from protected workforce groups including methods to implement gender-neutral references in the City's HR data, inclusion of second legal surnames within HR data and Outlook, address naming convention needs presented by City affinity groups, the addition of foster children to the wait list prioritization for the City's childcare program, and the development of strategies for equitable paycheck distribution for the City's contingent workforce population.

Strategic Support affirms BHR's goal to provide equitable access to human resource services through arranging interpretation/translation services and providing materials for people who speak languages other than English, including hearing and sight impaired communities.

Operations and Strategic Support provides resources to coordinate services for employees with disabilities in need of ADA accommodations. These provisions meet BHR's goal of providing equitable City services to all employees and residents by effectively removing barriers and implementing practices that ensure active engagement for all employees.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of payroll checks direct deposited	94%	94%	96%	100%	100%

Explanation of Services

The Bureau of Human Resources leads the City's Employer Branding initiative, which identifies the City as a values-based employer to attract, develop, and retain a diverse, culturally competent, fully engaged workforce. The Bureau of Human Resources is also responsible for leading Citywide initiatives that support Citywide onboarding, Path to Leadership training, centralized training opportunities, employee wellness programs, and talent development programs.

Operations and Strategic support oversees the SAP HCM system in collaboration with the Bureau of Technology Services' Enterprise Business Solution (EBS) Division.

Operations and Strategic Support administers pay practice and compensation provisions of the City's nine collective bargaining agreements and administrative rules, legal agreements affecting employee compensation, settlement agreements, and arbitrator awards. Additional service provisions include employee time entry management and processing administration which involves quota adjustments, settlement agreements, administering the catastrophic leave donation process, and coordinating the off-cycle check request.

Operations and Strategic Support provides guidance for SAP end-users, responses to public records requests, information requests, and is working to develop new performance measures that will illustrate program efficiency and effectiveness.

HR and Payroll customers include City bureaus, all City employees, retirees, and third-party payees.

Equity Impacts

BHR incorporates an equity lens in all facets of business through programs that reach disadvantaged communities of color and persons living with disabilities. BHR serves as the central hub for collecting and reporting all Equal Opportunity Employer data.

Operations and Strategic Support facilitates research and provides tools needed for ADA Title I accommodations including workplace adjustments and special ADA accommodations for disabled employees.

Changes to Program

Over the past several years, declining resources have resulted in streamlined processes. The number of staff has remained static in the HR and Payroll Services program while the total number of City employees (regular and casual) requiring services from the program has continued to grow. In addition, there is an ongoing need to make more information and processes functional and accessible to our customers on a variety of devices.

This program will not be impacted by the one percent constraint requirement or as a result of other significant internal reallocations.

Operations and Strategic Support continually reassesses and streamlines processes to maintain an efficient and effective HR system. In the past year, HR and Payroll Services has held multiple stakeholder feedback meetings, conducted a customer service survey, implemented transaction service metrics, and made process improvements resulting in a 30% reduction of personnel transaction cycle time.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	88,531
Internal Materials and Services	0	0	0	795,644
Personnel	0	0	0	2,729,712
Sum:	**0**	**0**	**0**	**3,613,887**
FTE	0	0	0	21.78

Resources: The primary resource for this program is General Fund discretionary.

Expenses: Most of the expenses from this program are for personnel services.

Staffing: Operations and Strategic Support program staffing has been static. The workload of HR and Payroll Services has increased significantly due to growth in the City's total workforce. While Operations and Strategic Support will continue to pursue efficiencies, increases in the total number of City employees, HR legal complexities, and new business requirements will generate a need for future resources in this program area.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Management & Finance **Program Contact:** Larry Nelson

Website: www.portlandoregon.gov/bhr **Contact Phone** 503-823-6118

BTS - Production Services

Program Description & Goals

BTS Production Services supports the City goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions by maintaining a premier production technology environment.

Performance measures for the Production Services program focus on the high reliability of the City's mission-critical production systems (SAP, RegJIN, VCAD, email, and Cayenta) with availability comparable to public and private industry best practices and standards.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of mission critical production system availability for Cayenta	100.00%	99.97%	99.97%	100.00%	99.97%
Percentage of mission critical production system availability for SAP	100.00%	99.98%	99.96%	100.00%	99.96%
Percentage of email availability excluding scheduled maintenance	100.00%	99.99%	99.90%	100.00%	99.90%
Percentage of public safety system availability - Bureau of Emergency Communications	100.00%	99.99%	99.99%	100.00%	99.99%
Public Safety systems availability - Police (excluding scheduled maintenance)	100.00%	99.99%	99.99%	100.00%	99.99%

Explanation of Services

Production Services maintains and supports the City's data center facilities, server, email, storage, and backup infrastructure.

Production Services supports the City's mission-critical technology systems including SAP, Cayenta, Synergen, Maximo, Versaterm Computer-Aided Dispatch (VCAD), Regional Justice Information Network (RegJIN), email, and the Tracking, Review, Application, Construction System (TRACS). Production Services also develops and maintains the BTS business continuity and disaster recovery plan.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

In FY 2018-19, Production Services completed phase II of Portland Building Data Center move by co-locating the Data Center to an out-of-state facility that will further strengthen the City's disaster recovery and resiliency capabilities.

BTS's base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20.
Production Services does not anticipate significant organizational changes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	1,973,571	-17,307	157,005	1,109,540
External Materials and Services	3,647,904	3,293,255	7,490,369	2,984,482
Internal Materials and Services	796,775	755,556	170,054	174,558
Personnel	3,040,337	3,199,941	3,597,770	3,446,782
Sum:	**9,458,587**	**7,231,445**	**11,415,198**	**7,715,362**
FTE	20	20	20	21

Resources: Resources supporting the Production Services program are primarily interagency revenues. Costs are allocated to rates specific to the technology systems supported by Production Services. Those rates are charged to the customers accessing those systems.

Provided BTS customers continue to rely on and request these systems that Production Services supports, the revenues should be sustainable with no material change in the general upward trend in usage of those systems. Current program structure has no impact on different populations' abilities to access services.

Expenses: Primary expenses for the program are incurred in personnel services with most of the additional expenses in external materials and services. Expenses are mostly fixed, predictable, and necessary as long as the City requires the use of systems supported by Production Services. This program incurs material project expenses which can vary. There is some discretion in these costs, primarily in the timing of the expenses more so than the actual expense itself.

Staffing: Production Services includes information systems managers, analysts, and a supervisor.

Assets and Liabilities: Production Services currently has more than $2,000,000 in assets. This amount will increase once the $10,000,000 Data Center project is capitalized. Assets are in good condition. A component in BTS rates allows for the collection of major maintenance funds to help cover the ongoing costs of upgrades and replacement of assets. Replacement funds cover a portion of the costs with the balance coming from general technology reserves.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Amy Tuttle
Website:	https://www.portlandoregon.gov/bts/index.cfm?	**Contact Phone**	503-823-7930

BRFS - Debt Management

Program Description & Goals

The City of Portland issues a variety of debt instruments to raise capital for construction projects, acquire equipment and facilities, and refinance existing debt. Within the Bureau of Revenue and Financial Services (BRFS), the Debt Management Division directs the City's debt finance program to ensure access to both public and private capital markets in a timely manner that address bureau needs. The City's debt consists of publicly issued long-term bond issues, private placements of debt obligations, and credit facilities.

The goal of the Debt Management Division is to administer the City's debt program in a manner that achieves the lowest borrowing cost and least financial risk. A primary driver of the City's borrowing cost and measurement of risk to its investors is a credit rating. Most of the City's public bond issues are assigned a credit rating by one or more national rating agencies, including Moody's Investors Service and S&P Global Ratings. Credit ratings are based on an independent analysis by financial market professionals and indicate the credit-worthiness of the City's debt obligations. For more than 40 years, the City's unlimited tax general obligation debt has been rated "Aaa," the highest possible rating by Moody's Investors Service. In February 2017, Moody's upgraded the rating on the City's limited tax revenue bonds to "Aaa."

Since May 2010, the City's Lien Water System Revenue Bonds have been rated "Aaa" by Moody's. The underlying ratings for most other types of City revenue bonds are between "Aa1" and "Aa3" by Moody's, and either "AA-" or "AA" by S&P Global Ratings.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Citys unlimited tax General Obligation bond rating (1=Aaa)	1	1	1	1	1

Explanation of Services

Debt Management's daily activities are critical to achievement of the City's financial, capital investment and infrastructure maintenance goals. Through informed financing decisions, Debt Management supports the City by delivering efficient, effective, and accountable municipal services through:

- Conservatively managing the issuance of new borrowings in accordance with the City's Debt Policies
- Acquiring up-to-date information on financial markets to capitalize on savings opportunities within existing borrowings
- Providing financial expertise and innovative solutions to analyze bureau projects and meet bureau business needs
- Maintaining communications with the City's credit rating agencies and existing investor base through post-issuance continuing disclosure
- Complying with State of Oregon and federal laws regarding debt, including IRS arbitrage rebate and other tax-exempt regulatory requirements.

Equity Impacts

Equity is impacted by providing the necessary capital to cost-effectively fund numerous social-based investments across the City. In FY 2018-19, the Debt Management Division anticipates issuing the City's second bond under the voter-authorized $258.4 million general obligation bond authorization for affordable housing.

Changes to Program

Debt Management does not anticipate any significant changes in the FY 2019-20 adopted budget at this time.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	52,369	47,381	215,784	212,817
Internal Materials and Services	56,325	55,217	80,539	82,857
Personnel	493,299	409,402	525,133	547,807
Sum:	**601,993**	**512,001**	**821,456**	**843,481**
FTE	3.17	3.17	3.17	2.69

Resources: Debt Management is funded through interagency charges, 25% of which are direct costs to the General Fund. All unspent interagency charges are returned to customer bureaus at year-end.

Expenses: Debt Management deploys its resources diligently to provide the most value to City bureaus in the most cost-effective manner. Expenditures primarily include personnel costs, office space, specialized debt modeling software, and financial market information services.

Staffing: Debt Management staff includes the Debt Manager, an Analyst III, and portions of the City Treasurer and Analyst II positions.

Assets and Liabilities: The Debt Management program uses a software subscription service named DBC Finance amounting to approximately $15,000 a year. The subscription is funded through interagency charges.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/brfs/69869

Program Contact: Matthew Gierach

Contact Phone 503-823-6822

BTS - Public Safety Technology

Program Description & Goals

The BTS Public Safety Technology division supports the City goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions by delivering dependable services and innovative solutions.

Performance results for the division are measured by the high availability of the Field Reporting System for use by police officers while on duty.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of time radio system operated without failure	100.00%	99.96%	99.99%	100.00%	99.99%
Mobile Report Entry (MRE) availability (excluding scheduled maintenance)	100%	100%	100%	100%	100%

Explanation of Services

The responsibilities of the division include maintaining critical radio and emergency dispatch systems, developing and maintaining applications, supporting technology infrastructure, and rapid response and resolution to all field and support requests for public safety.

Performance results for the division are measured by the high availability of the Field Reporting System for use by police officers while on duty.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

BTS's base budget was developed with the goal of achieving cuts by identifying efficiencies with minimal service impacts in FY 2019-20.

Public Safety Technology has not experienced significant changes due to external factors and does not anticipate significant organizational changes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	42,712	395,000	
External Materials and Services	101,902	-87,317	1,710,685	1,799,704
Internal Materials and Services	-332,903	184,840	577,710	559,905
Personnel	1,975,797	3,141,284	5,510,880	5,729,884
Fund Expense				
Contingency	0	0	1,205,676	0
Fund Transfers - Expense	0	291,746	3,150,000	0
Sum:	**1,744,796**	**3,573,265**	**12,549,951**	**8,089,493**
FTE	17	26	28	37

Resources: Resources supporting the Public Safety Technology program are varied depending on the service provided. Police and the Bureau of Emergency Communications provide resources to the program through interagency charges in support of their RegJIN and CAD applications respectively. Fire and Police also receive bureau-specific services for which they are charged by BTS. Resources supporting the 800 MHz radio system are received from internal and external customers. Public safety systems are all vital to the safety of both the City and the region, the resources BTS receives should be considered sustainable now and in the future. The current structure will have no impact on different populations' abilities to access services provided by this program.

Expenses: The program's expenses are primarily incurred in Personnel Services since much of the work is in providing support for applications and hardware, as well as in maintaining the 800 MHz radio system. The program also incurs expenses in other major object codes, but many of those can be variable as they are related to CIPs and Operating Projects. Personnel Services expenses should be considered fixed, predictable and necessary since they support vital City/regional services. There is some discretion in project costs, primarily in the timing of the expenses more so than the actual expense itself.

Staffing: Public Safety Technology includes information systems managers, applications analysts, technical analysts, an information systems supervisor, an administrator, engineers, and electronics technicians.

Assets and Liabilities: The Public Safety Technology program has assets of over $40 million, most of which is in the 800 MHz radio system. The recently updated system is in excellent condition. Projects related to maintaining and upgrading the system are partially funded through major maintenance revenues collected from the 800 MHz access fee rate. Additional funding for projects comes from technology reserves.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BTS - Project Management Office

Program Description & Goals

The BTS Project Management Office (PMO) supports the City goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions by delivering technology project management services modeled after industry standards and best practices.

Program performance is measured through direct customer survey feedback at the completion of projects. Customers who agree that the project management service provided rate as "Excellent" generally varies between 75% and 100% as the survey is voluntary. The PMO has a strategic goal of 75% in FY 2021-22.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of customers rating project management service provided as excellent	75%	N/A	70%	100%	75%

Explanation of Services

The PMO delivers effective and consistent Citywide project management practices for all disciplines of technology services provided by each Bureau of Technology Services (BTS) program. Program responsibilities are twofold in that the program provides support to BTS as a whole and also supports BTS work on projects benefiting customers. The existing program structure allows for equal and open access to all City bureaus for the services the program provides.

The responsibility of the PMO is to implement consistent project management methodologies regardless of technology discipline or program, facilitate project oversight, resource alignment across the organization, and facilitate effective technology governance to ensure BTS is delivering the City's highest priority technology initiatives.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

Project Management Office has not experienced significant changes due to external factors. BTS's base budget was developed with the goal of achieving reductions by identifying efficiencies with minimal service impacts in FY 2019-20.

PMO does not anticipate significant organizational changes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	136,001	185,674	5,151,472	156,972
Internal Materials and Services	-169,517	112,287	88,875	92,360
Personnel	936,162	1,267,892	1,952,011	1,956,865
Sum:	**902,646**	**1,565,853**	**7,192,358**	**2,206,197**
FTE	9	12	12	12

Resources: Resources supporting the program are partially received from interagency revenues and partially through billings to customers for project management time.

Expenses: Program expenses are incurred in personnel as the function of the program is for project managers to work collaboratively both with other BTS programs as well as customer bureaus. Costs are effectively fixed and required in order to meet the requested needs of customers.

Staffing: The PMO includes project managers and information systems analysts.

Assets and Liabilities: There are no key assets owned or operated by this program.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BRFS - Procurement Services

Program Description & Goals

Procurement Services supports City bureaus through the acquisition of high-quality, outsourced supplies, materials, equipment and services in a timely, efficient, and effective manner. Acquisitions are compliant with applicable laws, regulations, and City policies. Procurement Services reports uniformly across all procurement teams on six (6) milestones throughout its business processes to increase transparency and to measure performance relative to service level agreements (SLAs) with bureaus. Since SLAs have only recently been implemented, historic data and service level comparisons are not yet available.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of apprenticeship hours worked on City contracts	18%	17%	20%	20%	0
Percentage of minority and women hours worked on City construction contracts	27%	24%	27%	27%	27%
Number of prime contracts awarded to Minority, Women, and Emerging Small Businesses contractors	277	242	277	242	277
Percentage of all subcontract dollars awarded to Minority, Women, and Emerging Small Businesses subs for construction and professional services contracts	43%	51%	30%	30%	30%
Cycle-time for construction invitation to bid process	0	N/A	0	160	160
Cycle-time for Goods and Services request for proposals process	0	N/A	0	300	300
Cycle-time for Goods and Services invitation to bid process	0	N/A	0	106	106
Cycle-time for Design Services requests	0	N/A	0	240	240
Cycle-time for Construction request for proposals process	0	N/A	0	300	300

Explanation of Services

Procurement Services is comprised of seven teams and programs: Design & Construction Services, Goods & Services, Compliance Services, Social Equity in Contracting, Sustainable Procurement Program, Procurement Card Program, and the Project Management Procurement Related Training Program.

The Design & Construction Services Team is dedicated to bureaus that contract out for architectural, engineering, and other related design services in addition to construction services. This program contains a separate design team and construction team that work collaboratively to provide bureaus with seamless procurement support from the design phase of a project through the award of the construction contract.

The Goods & Services Team supports bureaus in the acquisition of outsourced goods and services that are not construction-related. This program contains a Goods Team and a Services Team that work collaboratively to maintain inventories and provide centralized procurement support. The Services Team provides centralized procurement support for all bureaus in ordinary services, and professional, technical, and expert capacities – excluding construction design services. Compliance Services manages the following two programs for the City:

Compliance Services manages the following five programs for the City:

1) Subcontractor Equity Program - The Subcontractor Equity Program (SEP) requires contractors on specified projects to make subcontracting opportunities available to Disadvantaged Business Enterprises (DBE), Minority-owned Business Enterprises (MBE), Woman-owned Business Enterprises (WBE) and Emerging Small Businesses (ESB) when subcontracting portions of a project. Procurement Services collects and tracks information on contractors as outlined in the SEP requirements.

2) Workforce Training and Hiring Program – The Workforce Training and Hiring Program (WTHP) requires contractors working on certain construction projects to make efforts to hire and train a diverse workforce, including apprentices, under specified circumstances.

The Social Equity in Contracting team consists of two program coordinators and a program manager who manage the following programs:

1) The Minority Evaluator Program (MEP) was initiated following passage of a resolution by City Council in response to the 2009 Disparity Study and is intended to engage diverse members of the community into the City's evaluation and contractor selection process.

2) The Prime Contractor Development Program (PCDP) was initiated by City Council in July 2012 to create opportunities for State of Oregon certified firms to obtain prime contracts with the City for construction projects.

The Community Opportunities and Enhancements Program (COEP) was established by City Council in November 2017 in conjunction with the City's major infrastructure bureaus to establish a fund that collects 1% of all City contracted out construction services to be dedicated to diversifying the construction and trade workforce in the Portland Metro region as well as to provide technical assistance to certified firms for subcontracting opportunities on the City's construction projects.
The Sustainable Procurement Program provides the framework for City employees to integrate sustainability principles (balancing environmental, social, and economic factors) into procurement decisions. This program will receive one-time funding to explore developing and establishing a regional clean air construction standard. The funding is for limited duration employee and programmatic costs. It is anticipated that the City will receive funding from other regional government agencies via intergovernmental agreements to establish a regional framework to implement the clean air construction requirements. Depending on the amount and the duration of the anticipated agreements with other regional government agencies, Procurement Services may need to ask for ongoing funding to continue with implementing this policy initiative.
The City is the leader of a procurement card consortium that consists of several other local government agencies. The program reduces nearly two-thirds of the cost of other payment processing methods, helping the City realize significant cost savings in the manual processing of small purchases.

The Project Manager Training Program provides training for bureau project managers and their staff on procurement-related activities. Specific courses align with project manager job responsibilities for construction; goods and services; and professional, technical, expert areas of procurement.

Equity Impacts

The division monitors compliance with a variety of Council initiatives designed to address equity on City construction projects and service contracts.

Changes to Program

In FY 2018-19, Procurement Services reorganized into a new structure with the addition of nine new staff resources approved in the FY 2018-19 Fall Budget Monitoring Process. With the reorganization and additional resources, Procurement Services has established SLAs with customers on the time it takes to complete major procurement processes and execute a contract. In an effort to become more transparent and report on performance relative to the SLAs, Procurement Services has begun uniform reporting across all procurement teams on its workload at six distinct milestones throughout the various procurement processes.

Overall, the Procurement Division was successful in obtaining new interagency agreement funding of $975,293 and the equivalent of $164,565 in new General Fund resources to fund 8.0 additional full-time employees (FTE) in FY 2018-19. An additional 1.0 FTE was also added and is to be funded from a different source. The FY 2019-20 full-year impact of these requests, as submitted, is estimated at $2.2 million in interagency agreement revenue and $408,858 in ongoing General Fund resources.

For FY 2019-20, Procurement Services will receive one-time funding to explore developing and establishing a regional clean air construction standard. The funding is for limited duration employee and programmatic costs.

Procurement Services will be hiring a Program Manager to implement COEP. It is expected that a candidate will be hired in the first quarter of FY 2019-20 and will begin working with the Office of Equity and Human Rights, the infrastructure bureaus, and Prosper Portland.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	0
External Materials and Services	-3,539	122,375	1,030,583	1,636,582
Internal Materials and Services	834,840	878,067	598,338	537,797
Personnel	3,803,781	3,796,485	4,852,859	6,920,735
Sum:	**4,635,082**	**4,796,927**	**6,481,780**	**9,095,114**
FTE	37.17	36.17	37.16	50.36

Resources: Procurement Services is funded primarily by general fund overhead resources and interagency funding from infrastructure bureaus. The division also receives a smaller proportion of its funding from interagency and intergovernmental partners.

Expenses: The primary expense of the program is staffing. The remainder supports the materials and services associated with program operations, including IT systems licensing and maintenance fees, facilities, rent, and technology support. Expenditures are predictable and scale up and down with staffing.

Staffing: There are 49 authorized positions in the division – which includes nine (9) positions added during FY 2018-19 Fall Budget Monitoring Process. Design & Construction workload volume fluctuations will require bureau staffing levels to scale up or down.

Assets and Liabilities: The only assets maintained by this division are software-based. The division completed implementation of its B2G system in FY 2018-19, and the Buy Speed System is in the middle of its anticipated useful life. Procurement has set aside technology replacement funding over the past five years.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Lester Spitler
Website:	portlandoregon.gov/brfs	**Contact Phone**	503-823-1095

BTS - P&D - Duplicating

Program Description & Goals

Duplicating provides centralized, high-quality, convenient, leading edge, and cost-effective print, reproduction, and additional copier services to City staff, external customers, and the public.

Duplicating, the most recognizable portion of Printing & Distribution, supports each bureau's unique workflow with products and services configured to maximize efficiency and effectiveness. The division's mission is to be the printer of choice for all City operations. The print shop is responsible for the City's central in-house printing and binding, pre-press services, paper purchases, scanning, and customer service program.

A Key Performance Measure (KPM) for Duplicating is the basic copy center rate as a percent of private sector rates. This comparison is performed once every two years as part of the OMF rate study. Printing & Distribution currently charges $0.034 per sheet compared with the local average of $0.07. Through careful management of costs and personnel, Duplicating is expected to maintain rates in the mid 40% of market rates, or lower, for the foreseeable future. This performance measure will be transitioned out to cost per sheet during FY 2020-21.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of Service Requests shipped on time	99%	100%	99%	99%	100%
Basic Copy Center rate as a percentage of private sector rate	48%	37%	48%	40%	48%
Service Requests per FTE	2,702	2,365	2,700	2,300	2,700

Explanation of Services

Duplicating exists to meet the print needs of City bureaus, including products designed to communicate with the community members of Portland.

Duplicating is the City's centralized print shop. The program is able to capture economies of scale due to high demand for services, by providing the most frequently requested services in house, and by procuring outside services for less frequent items. Much of the work at Duplicating is completed within one business day. Fast and consistent services allow Duplicating's customers to focus on their core business operations.

Duplicating provides high quality goods and services below market rates and has earned high customer service rankings. The program continuously strives to be the customer's printer of choice with a goal of delivering services as efficiently as possible to enhance the community member interaction with the City.

Equity Impacts

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

Duplicating's base budget was developed with the goal of achieving the one percent constraint budget by identifying efficiencies with minimal service impacts in FY 2019-20.

As of FY 2018-19, Duplicating services is located within BTS. This reorganization has had limited effect on service operations. Over the years, customer printing needs have changed to include more short-run jobs, increased mailers, and a transition from microfilm to digital scanning. Demand for full color digital printing has also increased.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	210,688	65,537	260,000	210,000
External Materials and Services	1,399,194	1,446,197	1,520,592	1,578,233
Internal Materials and Services	-70,176	121,842	756,369	644,932
Personnel	1,168,175	1,114,819	1,449,809	1,335,312
Fund Expense				
Contingency	0	0	-152,000	2,312,685
Debt Service	0	0	127,619	133,203
Fund Transfers - Expense	0	0	290,800	268,508
Sum:	**2,707,881**	**2,748,395**	**4,253,189**	**6,482,873**
FTE	13.57	13.9	12.9	12.7

Resources: The primary resources that fund the Duplicating are interagency agreements with other City bureaus and intergovernmental agreements with other local agencies. Funding also comes from the public in cooperation with the permitting process in the Bureau of Development Services.

Expenses: The primary expenses for this program include personnel costs, materials, and services. Fund-level expenses and administrative costs for Printing & Distribution are included in the Duplicating program.

Staffing: Duplicating has 12.7 FTE allocated to the program.

Assets and Liabilities: Duplicating is equipped with up-to-date City owned print and bindery equipment. Duplicating invests in new equipment as technology and business needs require.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BTS - P&D - Copy Services

Program Description & Goals

The Copier Services program at Printing & Distribution (P&D) provides convenient Multi-Function Devices (MFDs) to be used by City employees for individual office printing and small copy work. Since the recent realignment with BTS, P&D is working closer with bureaus to ensure minimal usage of more expensive color output. P&D is also closely coordinating with the Portland Building Reconstruction project for a print management system.

Citywide policy governing the use of MFD resources is to deliver efficient, effective, and accountable copy services.

A Key Performance Measure (KPM) for Copier Services is the percent of black & white output over total output. This ties in with current year efforts to lower the number of color copies on our MFDs. This workload KPM is new for FY 2019-20.

All BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of black and white impressions of program totals	0	N/A	0	71%	0

Explanation of Services

Copier Services was formed to provide a consistent method for City employees to make convenient copies. MFDs have print and scan functionalities and are a cost-effective way for producing copies and prints.

Copier Services strives to balance needs of bureaus with their potential selection of laser printers. Copier Services manages service contracts with vendors to ensure cost effective machine operations and maintenance.

This internal facing program enables bureaus to focus on their primary business rather than each having to manage MFD service vendors.

Equity Impacts

As an internal service provider, BTS works with internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

Copier Services base budget was developed with the goal of achieving the one percent constraint budget by identifying efficiencies with minimal service impacts in FY 2019-20.

As of FY 2018-19, Copier Services is now part of BTS. This will allow closer partnership with the server teams as well as closer coordination with laser printer placements.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	99,818	566	120,000	465,244
External Materials and Services	305,773	386,558	861,861	444,195
Internal Materials and Services	-48,429	-54,857	49,981	40,000
Personnel	98,620	116,249	113,709	125,004
Fund Expense				
Debt Service	0	0	11,144	13,352
Fund Transfers - Expense	0	0	1,359	2,223
Sum:	**455,782**	**448,517**	**1,158,054**	**1,090,018**
FTE	1.1	1.1	1.1	1.2

Resources: Copier Services is funded by interagency agreements with other City bureaus based on their copier usage. A portion of the copy rate goes towards the replacement of equipment.

Expenses: Primary expenses within this program are material and services followed by capital expenditures and personnel services.

Staffing: Copiers Services has 1.2 FTE allocated to the program.

Assets and Liabilities: Copiers Services owns the MFDs throughout City's bureaus. Ideally, the machines are replaced every five years though actual replacement is heavily influenced by usage.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BTS - P&D - Distribution

Program Description & Goals

Distribution is part of the Printing & Distribution Division and provides processing of all the City's US mail, interoffice mail delivery and pick-up, and print delivery to City customers as well as external customers including Multnomah County, Metro, and others.

Distribution is centralized by default. The program processes incoming and outgoing US mail. Distribution monitors all postage usage and garners sizable discounts through commingling City mail.

A Key Performance Measure (KPM) for Distribution is the number of US mail pieces handled per team member. This workload KPM is new for FY 2019-20.

BTS program managers, along with subordinate managers and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Pieces of US mail processed per distribution employee	0	N/A	0	1,200,000	0

Explanation of Services

Distribution maintains mail and delivery services on behalf of bureaus and to community members living in Portland. In addition to scheduled deliveries and US mail sorting, Distribution also provides daily service to the Portland Water Bureau laboratory. Distribution allows bureaus to focus on their primary business rather than managing mail and delivery services. Distribution strives to meet the delivery needs of customers.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

As an internal service provider, BTS works with internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

Distribution's base budget was developed with the goal of achieving the one percent constraint budget by identifying efficiencies with minimal service impacts in FY 2019-20.

As of FY 2018-19, Distribution is located within BTS. The reorganization has had limited effect on the program operating structure. The City continues to rely on US mail to communicate with its customers and the community members of Portland.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	30,000	30,000
External Materials and Services	1,944,067	1,951,765	2,123,511	1,606,987
Internal Materials and Services	62	18,413	77,034	233,024
Personnel	491,679	511,219	456,518	521,809
Fund Expense				
Contingency	0	0	-577	0
Debt Service	0	0	45,848	49,271
Fund Transfers - Expense	0	0	5,593	8,201
Sum:	**2,435,808**	**2,481,397**	**2,737,927**	**2,449,292**
FTE	5	5	5	5.1

Resources: Distribution is funded by interagency agreements with other City bureaus.

Expenses: Primary expenses for the program include personnel costs, materials, and services related to US mail activity. Postage expenses are a pass-through cost.

Staffing: Distribution has 5.1 FTE allocated to this program.

Assets and Liabilities: Distribution has limited assets.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/bts/index.cfm?

Program Contact: Amy Tuttle

Contact Phone 503-823-7930

BRFS - Revenue Collection

Program Description & Goals

Revenue Collection Division provides centralized revenue collection and administrative support for the City and County business income tax, City and County transient lodgings tax, tourism improvement and enhanced service districts, special assessment liens, and central accounts receivable. In FY 2018-19, the business income and transient lodging taxes will collect approximately 28% of all General Fund revenues excluding transfers and ending balances. In FY 2019-20, the Division will collect and account for more than $600 million, including the voter approved clean energy initiative.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Investment portfolio yield - % of benchmark	114%	82%	100%	90%	100%
Cost per dollar collected by Revenue division (all programs)	$.02	$.02	$.02	$.03	$.02

Explanation of Services

The Revenue Collection program is tasked with maximizing City and partner agency revenue sources with a policy of firm and fair enforcement of tax and fee codes. Primary functions include tax return processing, non-filer and under-filer identification, and debt collection using a range of tools up to and including collection agencies and litigation. The program tracks cost per dollar collected, as well as the estimated business tax gap to ensure that collection efforts remain focused on maximizing the revenue yield.

Equity Impacts

The Revenue Collection program has Arts Tax forms and instructions available in 11 languages. Translation services are also available for phone calls and in-person communications. The Revenue Division works with Elders in Action to do community outreach and the dollars collected by this program directly fund equity efforts in all General Fund bureaus.

Changes to Program

The Revenue Collection program continues to face unpredictability and a potential shortfall in funding as serial one-time funds are being used to backfill 12 positions doing ongoing tax and fee collection work. The Division received new GF ongoing of $617,132 in FY 2019-20 but continues to use $1.5 million of GF one-time money to maintain current revenue collection staffing levels. Charging a fee on new revenue collection programs such as Rental Registration will be considered to offset the cost of specific programs. Meanwhile, there remains $1.2 million of GF one-time funding that covers 10 positions and related revenue collection costs of ongoing general fund programs such as Business Income and Transient Lodging Taxes. If these 10 positions are ever not funded, the Division estimates that approximately $9 million in revenue may go uncollected. Revenue Division’s Integrated Tax System (ITS) project received $9.4 million GF One-time funding in FY 2019-20 to proceed on this core database replacement project. ITS implementation is projected to begin in the first quarter of FY 2019-20 and will require additional resources in FY 2020-21 and FY 2021-22 currently estimated at $15-$20 million. The exact cost will be determined after the contracting process is completed.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	52,156,337
Internal Materials and Services	0	0	0	6,241,604
Personnel	0	0	0	11,938,410
Fund Expense				
Contingency	0	0	0	9,426,696
Debt Service	0	0	0	368,510
Fund Transfers - Expense	0	0	0	92,244
Sum:	**0**	**0**	**0**	**80,223,801**
FTE	0	0	0	89.16

Resources: The Revenue Collection program continues to face unpredictability and a potential shortfall in funding as serial one-time funds are being used to backfill 12 positions doing ongoing tax and fee collection work. The Division received new GF ongoing of $617,132 in FY 2019-20 but continues to use $1.5 million of GF one-time money to maintain current revenue collection staffing levels. Charging a fee on new revenue collection programs such as Rental Registration will be considered to offset the cost of specific programs. Meanwhile, there remains $1.2 million of GF one-time funding that covers 10 positions and related revenue collection costs of ongoing general fund programs such as Business Income and Transient Lodging Taxes. If these 10 positions are ever not funded, the Division estimates that approximately $9 million in revenue may go uncollected. Revenue Division's Integrated Tax System (ITS) project received $9.4 million GF One-time funding in FY 2019-20 to proceed on this core database replacement project. ITS implementation is projected to begin in the first quarter of FY 2019-20 and will require additional resources in FY 2020-21 and FY 2021-22 currently estimated at $15-$20 million. The exact cost will be determined after the contracting process is completed.

Expenses: Primarily fixed expenses for personnel services, and internal materials & services.

Staffing: Majority of the staff are tax collection and auditor positions who work directly with taxpayers to ensure tax returns are timely and reflect the full amount due to local jurisdictions.

Assets and Liabilities: N/A

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/revenue/

Program Contact: Thomas Lannom

Contact Phone 503-823-5154

BRFS - Insurance and Claims

Program Description & Goals

Risk Management is the City's centralized, operational risk management function, responsible for risk financing, claims administration, related statutory compliance, and advising on loss prevention and employee safety.

The City is self-insured, except in areas where the purchase of commercial insurance protects the City's financial interest. Risk Management influences risk-adjusted business decisions through its expert advice and consultation and loss-related data and analysis.

The City retains almost all cost for general liability, auto liability, law enforcement, and employment practice. The claims are centrally administered in City Risk. Retained claims tend to be frequent, low cost occurrences. Risk Management investigates every claim. Active management and expert adjusting help keep claim cost low. Over the past five years, claims with incurred costs under $5,000 (Risk's statutory authority under Charter and City Code) are:

- 90% of the general liability claims
- 84% of the auto claims

The primary goal of Risk Management's programs is to minimize and reduce the financial risk to the City, which is accomplished through:

- Bureau coordinated claims management administration
- Loss prevention training and consultation
- Quarterly and focused claims reviews
- Monthly bureau claims status
- Third party subrogation reimbursement efforts
- Annual Safety Committee Conference
- Bureau site visits and exposure analysis
- Interagency allocation review
- Risk Management staff training
- Fair and prompt claims settlement

Risk Management measures the cost of general liability claims over the prior four-year average, and the change in cost of fleet liability claims over the prior four-year average. General liability claims are decreasing in the amount awarded and number of overall claims are going down. Success is assessed by reductions in tort liability claims and costs.

Risk Management's portfolio of clients include City employees, community members, bureau leadership, and City Council. Risk Management serves a diverse population in Portland and treats all clients with the utmost respect and courtesy through prompt return of calls, training, proactive claims management, and reporting. Risk Management uses relay services for claimants with hearing or speech impairments and has access to the City's language bank to assist with translation needs.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Change in the cost of general liability claims over the prior four-year average	2%	-51%	5%	7%	[733] 0

Change in the cost of fleet liability claims over the prior four years	0	-3%	5%	4%	0

Explanation of Services

Under City Code 3.12.020 G, Risk Management is responsible for administering, coordinating, and controlling all activities related to commercial and self-insurance including, but not limited to, property and casualty insurance, workers' compensation insurance, liability insurance, and the City's right to subrogation on these insurance programs. Risk Management is responsible for protecting the City, its officers, agents, and employees against liability imposed on municipalities of the State of Oregon. Risk Management monitors and coordinates a Citywide loss prevention and control program to minimize potential property, liability, fidelity, and personnel losses; maintains records relating to commercial and self-insurance losses or claims filed against the City; and executes any claim or proof of loss for damage to City property.

Risk Management has self-administered its tort liability claims since 1978 when the City became self-insured. Self-administration of claims reduces the City's total cost of risk and allows the City to be in control of how the claims are administered without the reliance on a contracted Third-Party Administrator. Risk Management has cultivated long-term relationships with bureau clients and holds strong institutional knowledge – allowing Risk to accurately set reserves. Savings are returned to the services Risk Management offers its clients, as is the potential of a reduction of excess insurance premium costs.

Purchase of commercial insurance allows the City to transfer certain risk to an insurance company. These risks are much easier to quantify. The transfer of risk places less of a financial burden on the City versus the exposure.

Services provided are outlined in City Code. Program outcomes are intended to reduce the City's liability and place less of a burden on the City's financial interests, which include its capital assets, human capital, reputation, and its financial, strategic, and operational programs. The activities provided by Risk Management staff are intended to reduce and mitigate the City's financial liabilities.

Prompt and fair claims administration, coordination with bureaus in the claims management process, client training, guidance, and consultation all lead to reduction in the City's liability exposure and ensure regulatory compliance. Ensuring regulatory compliance as a self-insured employer reduces potential fines and penalties.

Equity Impacts

Risk Management does not track disaggregated quantitative data or collect qualitative information about how communities of color and people with disabilities access and experience services.

Risk Management uses relay services for claimants with hearing or speech impairments and has access to the City's language bank to aid with translation needs. City employees are required to attend City sponsored equity and diversity trainings.

Risk Management's clients are internal and external. Risk services affect clients of all backgrounds and abilities either directly or indirectly.

Changes to Program

Cybersecurity risk is an increasing challenge for the City and could pose a major financial risk due to outside influences. Evaluating the City's risk exposure requires interacting with different bureau clients to better understand the risk. Transferring as much of the risk to an insurance policy or contracts and careful planning efforts are necessary. Support from upper management and bureau directors will be required.

Risk is experiencing increased demand for services with no additions to staff. Risk Management spent over 20 hours working with bureaus to complete a cyber liability insurance application. Risk worked collaboratively with Bureau of Technology Services staff to help analyze the risk. Risk has attempted to meet the one percent budget constraint by budgeting vacancy savings and employing other efficiency measures to balance division budgets without lowering service levels.

In FY 2018-19, Risk Management was assigned to OMF's Bureau of Revenue and Financial Services. The City's former Risk Manager retired in May 2018 and an interim risk manager served for seven months to ensure a management liaison was in place and keep programs moving forward. No major changes to the programs occurred except the relocation of the Occupational Health & Infectious Disease Program to Human Resources.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	8,619	5,247	143,129	6,723,073
Internal Materials and Services	11,454	146,027	518,805	3,040,398
Personnel	-40,401	771	123,898	1,498,892
Fund Expense				
Contingency	0	0	33,136,639	34,605,484
Debt Service	22,361	11,181	101,727	107,906
Fund Transfers - Expense	202,573	172,780	211,612	219,359
Sum:	**204,606**	**336,006**	**34,235,810**	**46,195,112**
FTE	0.45	1	0.5	10.68

Resources: The Liability Fund is funded primarily from interagency agreements (IA) with City bureaus. The IA charges to bureaus are for self-insurance premiums. The premium for each bureau is based on a rate model that projects costs over the next five years and determines the amount to charge bureaus based on forecasted claims payments, actuarial reserve targets, commercial insurance costs, and administrative costs to manage and administer the program. Costs are allocated to bureaus based on experience (a four-year average of claims costs) and exposure (prior year payroll costs).

Expenses: Fund expenditures are primarily for claims-related payments. Projected claims are based on an independent actuarial study. Other significant expenses are for the management and administration of the program and excess insurance policy premium.

Staffing: Risk Management includes 10.5 employees who are split across the Workers' Compensation and the Insurance and Claims funds. Staffing has been nearly flat over the last five years.

Assets and Liabilities: The program has no significant assets or liabilities other than its cloud-based risk management system for managing, administering, tracking, and reporting on claims. The program's budget includes appropriation to maintain and improve the system.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Patrick Hughes
Website:	portlandoregon.gov/brfs	**Contact Phone**	503-823-5277

BRFS - Workers Compensation

Program Description & Goals

Risk Management is the City's centralized, operational risk management function, responsible for risk financing, claims administration, related statutory compliance, and advising on loss prevention and employee safety. Risk Management oversees the City's Workers' Compensation program.

The City is self-insured, except in areas where the purchase of commercial insurance protects the City's financial interest. Risk Management influences risk-adjusted business decisions through its expert advice and consultation and loss-related data and analysis.

The City retains almost all cost for workers' compensation claims. The claims are centrally administered in Risk Management. Retained claims tend to be frequent, low cost occurrences. Risk Management investigates every claim. Active management and expert adjusting help keep claim costs low. Over the past five years, claims with incurred costs under $5,000 (Risk's statutory authority under Charter and City Code) are 75% of workers' compensation claims.

The primary goal of Risk Management's programs is to minimize and reduce the financial risk to the City, which is accomplished through:

- Bureau coordinated claims management administration
- Quarterly and focused claims reviews
- Monthly bureau claims status
- Job analysis
- Integrated claims review with BHR
- Annual State Compliance Efficiency Audit (yearly score excess of 90%)
- Interagency allocation review
- Risk Management staff training
- Fair and prompt claims settlement
- Employer-at-injury program (EAIP)

Workers' compensation is audited annually by the State of Oregon. The performance trends monitored by the State include:

- Accurate reimbursements to workers
- Timely first payment of temporary disability
- Timely payment of subsequent temporary disability
- Timely reimbursements to workers
- Timely payment of permanent total disability benefits
- Timely claim acceptance or denial
- Timely Notice of Closure
- Timely claim reporting (1502 filing)
- Accurate reporting of timeliness of first payment of temporary disability
- Accurate reporting of timeliness of claim acceptance or denial
- Accurate reporting of timeliness of Notices of Closure

Workers' compensation claims counts have remained flat for the past 10 years, while both indemnity and medical benefits have increased due to inflation.

The policy of the Risk Workers' Compensation (WC) Team is to ensure that employees injured on the job are provided benefits in accordance with Oregon Workers' Compensation Statute under

ORS Chapter 656 and the City's HR Administrative Rules. Risk's RMIS software system tracks all claims, including financials. The goal of the Workers' Compensation program is compliance with state timelines and accuracy requirements. The State of Oregon's annual audit has continued to produce optimal results.

Risk Management's portfolio of clients include City employees, community members, bureau leadership, and City Council. Risk Management serves a diverse population in Portland and treats all clients with the utmost respect and courtesy through prompt return of calls, training, proactive claims management, and reporting. Risk Management uses relay services for claimants with hearing or speech impairments and has access to the City's language bank to assist with translation needs.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Change in the cost of workers compensation claims over the prior four years	2%	-16%	5%	4%	0

Explanation of Services

Under City Code 3.12.020 G, Risk Management is responsible for administering, coordinating, and controlling all activities related to commercial and self-insurance including, but not limited to, property and casualty insurance, workers' compensation insurance, liability insurance, and the City's right to subrogation on these insurance programs. Risk Management is responsible for protecting the City, its officers, agents, and employees against liability imposed on municipalities of the State of Oregon. Risk Management monitors and coordinates a Citywide loss prevention and control program to minimize potential property, liability, fidelity, and personnel losses; maintains records relating to commercial and self-insurance losses or claims filed against the City; and executes any claim or proof of loss for damage to City property.

Risk Management has self-administered its tort liability claims since 1978 when the City became self-insured. Self-administration of claims reduces the City's total cost of risk and allows the City to be in control of how the claims are administered without the reliance on a contracted Third-Party Administrator. Risk Management has cultivated long-term relationships with bureau clients and holds strong institutional knowledge – allowing Risk to accurately set reserves. Savings are returned to the services Risk Management offers its clients, as is the potential of a reduction of excess insurance premium costs.

Services provided are outlined in City Code. Program outcomes are intended to reduce the City's liability and place less of a burden on the City's financial interests, which include its capital assets, human capital, reputation, and its financial, strategic, and operational programs. The activities provided by Risk Management staff are intended to reduce and mitigate the City's financial liabilities.

Prompt and fair claims administration, coordination with bureaus in the claims management process, client training, guidance, and consultation all lead to reduction in the city's liability exposure and ensure regulatory compliance. Ensuring regulatory compliance as a self-insured employer reduces potential fines and penalties.

Equity Impacts

Risk Management does not track disaggregated quantitative data or collect qualitative information about how communities of color and people with disabilities access and experience services.

Risk Management uses relay services for claimants with hearing or speech impairments and has access to the City's language bank to aid with translation needs. City employees are required to attend City sponsored equity and diversity training.

Risk Management's clients are internal and external. Risk services affect clients of all backgrounds and abilities either directly or indirectly.

Changes to Program

Legislative actions which may affect and amend Oregon Workers' Compensation rules and statutes may necessitate modification of the Risk Workers' Compensation program. Risk staff perform ongoing review and strategic planning activities to monitor any such possible legislative actions, while concurrently planning for any required compliance needs which may require implementation. Other external factors which may necessitate programmatic changes include health care cost increases, (e.g., inclusion of experimental treatments and diagnostic methods), unforeseen shortages in available health care providers, and catastrophic disaster incidents.

The State of Oregon has recently modified the method employers in the state are required to calculate the average weekly wage of injured workers. This process change has significantly increased the internal administrative workload of researching and calculating wages without a corresponding increase in staff. Workers' Compensation has attempted to meet the one percent budget constraint by budgeting vacancy savings and employing other efficiency measures to balance division budgets without lowering service levels.

In FY 2018-19, Risk Management was assigned to OMF's Bureau of Revenue and Financial Services. The City's former Risk Manager retired in May 2018 and an interim risk manager served for seven months to ensure a management liaison was in place and keep programs moving forward. No major changes to the programs occurred except the relocation of the Occupational Health and Infectious Disease program to Human Resources.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	11,203	6,510	1,193,797	3,742,442
Internal Materials and Services	20,821	149,579	363,970	616,697
Personnel	139,412	41,611	216,816	1,363,218
Fund Expense				
Contingency	0	0	12,139,464	11,932,579
Debt Service	20,915	20,916	95,153	100,933
Fund Transfers - Expense	132,635	90,937	113,901	126,785
Sum:	**324,986**	**309,552**	**14,123,101**	**17,882,654**
FTE	0.45	1	0.5	9.68

Resources: The Workers Compensation fund is funded primarily from interagency agreements (IA) with City bureaus. The IA charges to bureaus are for self-insurance premiums. The premium for each bureau is based on a rate model that projects costs over the next five years and determines the amount to charge bureaus based on forecasted claims payments, actuarial reserve targets, commercial insurance costs, and administrative costs to manage and administer the program. Costs are allocated to bureaus based on experience (a four-year average of claims costs) and exposure (prior year payroll costs).

Expenses: Fund expenditures are primarily for claims-related payments. Projected claims are based on an independent actuarial study. Other significant expenses are for the management and administration of the program, excess insurance policy premium, and State Workers' Compensation payments.

Staffing: Risk Management includes 10.5 employees who are split across the Workers' Compensation and the Insurance and Claims funds. Staffing has been nearly flat over the last five years.

Assets and Liabilities: The program has no significant assets or liabilities other than its cloud-based risk management system for managing, administering, tracking, and reporting on claims. The program's budget includes appropriation to maintain and improve the system.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Patrick Hughes
Website:	portlandoregon.gov/brfs	**Contact Phone**	503-8232-5277

BTS - Support Center

Program Description & Goals

The BTS Support Center program supports the City goal to deliver efficient, effective, and accountable municipal services, as well as the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions through the efforts to resolve City of Portland employee computing issues.

The Key Performance Measure for the Support Center is the Help Desk satisfaction rating. This measure is in accordance with the OMF Strategic Plan strategy of leading Citywide initiatives. Support Center performance is also measured by the percentage of Help Desk calls answered within 20 seconds and the percentage of problems resolved by Help Desk without escalation to field staff. The Support Center will continue efforts to exceed targets through a combination of training and expanding service management platform capabilities.

BTS program managers, their subordinate managers, and supervisors support the bureau's long-term goals of providing equitable City services to all residents by using an equity lens tool when making significant decisions, such as program planning, budgeting, and staffing decisions.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
First Call Resolution: percentage of problems resolved by Help Desk without escalation to field staff	71.00%	69.50%	48.00%	100.00%	80.00%
Percentage of calls answered within 20 seconds	63.00%	80.10%	52.00%	100.00%	80.00%
Help Desk satisfaction rating (scale 1 to 5)	4.90	4.91	3.00	5.00	4.75

Explanation of Services

The Support Center acts as the first point of contact for the majority of customer support needs. The program also implements and manages effective tracking systems and tools.

The responsibilities of the Support Center are to respond and resolve all desktop and laptop issues, mobile computing issues, provide user account and access oversight, and deliver new and replacement desktop computers in a timely manner. The Support Center is responsible for the City's centralized management of the approximately 2,500 mobile smartphones and tablet devices. The Support Center effectively manages City desktop, laptop, and server systems with robust administration and deployment tools. Support Center engineers implement and maintain the systems and tools needed for tracking service requests and computing assets.

As an internal service provider, BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community. Additionally, BTS interacts with the community members through the OMF Advisory Committee.

Equity Impacts

BTS works with its internal City customers to ensure community focused services have the information technology infrastructure tools in place to serve the community without regard to race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, or disability.

Changes to Program

Support Center has not experienced significant changes due to external factors. BTS's base budget was developed with the goal of achieving reductions by identifying efficiencies with minimal service impacts in FY 2019-20.

The Support Center does not anticipate significant organizational changes.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,364,889	1,418,555	3,314,840	2,838,444
Internal Materials and Services	350,717	358,010	340,695	366,453
Personnel	4,963,712	5,159,112	5,311,679	5,899,397
Fund Expense				
Contingency	0	0	0	4,241,529
Sum:	**6,679,318**	**6,935,676**	**8,967,214**	**13,345,823**
FTE	40	40	42	42

Resources: Support Center resources are primarily interagency rates for PCs and laptops. Those resources are used to cover overhead and other indirect costs, desktop and laptop support, and PC deployment. The resources are metric based (the metrics in this case are PCs, laptops, and tablets), which means that as long as customers continue to use these devices, the resources to BTS will be sustainable. The current/proposed structure will have no impact on different populations' abilities to access services.

Expenses: The program's expenses are incurred primarily in Personnel Services since it involves work on maintaining and deploying PCs and laptops and HelpDesk support. The program also incurs some variable expenses through work on CIPs and Operating Projects. There is some discretion in these costs, primarily in the timing of the expenses more so than the actual expense itself.

Staffing: The Support Center includes information systems technical analysts, an information systems manager, and information systems supervisors.

Assets and Liabilities: The Support Center program currently has $1.3 million book value in assets from implementation of some major application Capital Improvement Projects. No major maintenance funding is allocated in BTS rates specific to the Support Center program. Renewal and replacement of applications and related hardware is reliant on costs being covered by technology reserves.

Program Information

Bureau:	Office of Management & Finance	**Program Contact:**	Amy Tuttle
Website:	https://www.portlandoregon.gov/bts/index.cfm?	**Contact Phone**	503-823-7930

BRFS - Treasury

Program Description & Goals

The Treasury Division provides centralized banking, merchant, and investment services to all City bureaus. The functions of Treasury include managing the City's daily cash position, maintaining custody of all City funds, and ensuring excess funds are conservatively invested to earn a market return.

Treasury is also responsible for managing the City's banking, merchant card, and custodial service contracts and relationships. Treasury's daily activities are critical to achievement of the City's corporate financial strategies, compliance with City policies, industry best practices, legal and regulatory requirements on the state and federal level, including Payment Card Industry data security standards. Treasury is a net revenue producing operation to the City, distributing investment portfolio earnings (net of an administrative fee) to all City funds with balances – including the General Fund. Treasury is also the administrator of the City's foreclosure sale process as mandated under City Code.

The City's investment portfolio's gross yield is 2.335% against a benchmark was 2.393% (as of 4/30/2019). The City's portfolio yield normally lags the benchmark in a rising interest rate environment due to a shorter weighted average maturity compared to the benchmark. As securities in the City's portfolio mature, proceeds are re-invested in higher yielding securities and the portfolio yield will adjust over time.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Investment portfolio yield - % of benchmark	114%	82%	100%	90%	100%

Explanation of Services

The Treasury Division provides centralized banking services for all City bureaus and to Prosper Portland (via intergovernmental agreement). The program develops and executes the City's investment program, coordinates and reconciles all City cash deposits and disbursements, and provides cash and investment accounting. Treasury is responsible for negotiating and managing all banking, trust, and merchant (credit/debit card) service contracts and managing the interface between the City's financial institutions and all City bureaus. Treasury's daily activities are critical to executing the City's investment policy and strategies, and for compliance with applicable Internal Revenue Service arbitrage rebate requirements. Treasury supports Citywide cash management operations and serves as the primary resource for reconciliation of cash for central accounting, outside audit, and investment purposes.

Equity Impacts

Equity is impacted by providing cost-effective financial solutions to all City bureaus. When implementing or reviewing programs for bureaus, the Treasury Division employs an equity lens to ensure a broad array of payment methods (including cash) are available to provide equitable access to services for all constituents.

Changes to Program

In December 2018, City Council approved a select list of high-quality Corporate Securities issuers in which Treasury may invest the City's cash. Corporate securities provide diversification and an opportunity to earn additional yield over alternative investment types, such as U.S. Treasury and U.S. Agency securities. It is projected that the addition of this select group of Corporate Issuers to the City's Investment Policy would potentially contribute an additional $900,000 to $1,500,000 in annual investment earnings (depending upon the market availability of qualified securities).

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	0	0
External Materials and Services	200,387	233,261	318,841	307,152
Internal Materials and Services	98,813	146,179	156,714	176,329
Personnel	890,940	840,506	971,155	1,030,752
Sum:	**1,190,140**	**1,219,947**	**1,446,710**	**1,514,233**
FTE	6.17	6.17	6.17	6.03

Resources: Treasury Division operations are self-funded through administrative fees that are netted out of the investment portfolio's interest earnings. At the end of each fiscal year, Treasury's budget is netted to zero with all earnings distributed to the various bureau funds under management.

Expenses: The Treasury Division deploys resources diligently to provide the most value to City bureaus at the least cost. Expenditures primarily include personnel costs, office space, specialized investment software, financial market information services, and pass-through costs from financial institutions who provide services.

Staffing: The Treasury Division maintains a staff of 6.0 FTE. Staffing is not expected to change at this time.

Assets and Liabilities: The Treasury division has a software subscription service named GovInvest amounting to approximately $35,000 a year for the next three years. The subscription serves multiple bureaus and is partially funded by interagency agreements.

Program Information

Bureau: Office of Management & Finance

Website: https://www.portlandoregon.gov/brfs/69868

Program Contact: Brigid O' Callaghan

Contact Phone 503-823-3104

BHR - Workforce Recruitment and Training

Program Description & Goals

Workforce Recruitment and Training (WRT) provides a holistic portfolio of services to attract, retain, and develop an inclusive and talented workforce. The WRT program administers recruitments through NEOGOV to fill permanent, limited duration, seasonal, and temporary needs in the City's workforce. WRT develops and administers recruitments in accordance with federal, state, and City Administrative Rule guidelines, conducts and attends career fairs, administers "How to Apply" classes, and manages equity, diversity, and inclusion initiatives while partnering with community organizations, professional groups, and City bureaus. The WRT team is dedicated to delivering innovative, strategic, and consultative services for the City of Portland. This approach requires data driven and outcomes-based decision-making strategies.

Workforce Recruitment and Training supports the City's goal of seeking high quality candidates, educating the workforce on equity, providing training and development opportunities, and the City's goal to deliver efficient, effective, and accountable municipal services. WRT also supports the Office of Management & Finance strategies of developing an inclusive, talented workforce, leading Citywide initiatives, and adopting 21st century business solutions.

Workforce Recruitment and Training has one key performance measure relating to the OMF 2018-2020 Strategic Plan strategy of developing an inclusive, talented workforce. The key performance measure illustrates the percentage of focused outreach program participants on an eligible list who are hired. Percentages of female and minority applicants are expected to reach 44% and 35% respectively, in FY 2019-20.

Workforce Recruitment & Training is dedicated to providing services and leading programs and processes to guide the employee life cycle from recruitment to retention. The program's core values are equity, transparency, communication, and collaboration. WRT is responsible for multiple programs including: Affirmative Action reporting in accordance with the Office of Federal Contract Compliance Programs (OFCCP), the centralized accommodation system and fund to ensure equitable delivery of reasonable accommodations for people with disabilities during the recruitment process, marketing the City as an employer to attract and retain top talent, and developing recruitment strategies from entry level positions to executive roles with consistent and equitable processes. The Human Resources Tableau performance dashboard is available online and provides the ability to track key metrics, streamline processes and ensure transparency throughout the recruitment and selection process and can be found at https://www.portlandoregon.gov/bhr/77445.

Recruitment Timeline Metrics – Time to Fill and Time to Post

Time to fill is the length of time between the date a requisition is received by BHR to the date a verbal offer is extended to the selected candidate. In FY 2018-19, the average time to fill a position to date is 85 days.

Time to post is the length of time between the date a requisition is received by the BHR to the date that the job is posted and can begin accepting applications. Some recruitments are for only one bureau, while others require coordination among multiple bureaus. The average for the current fiscal year to date is six business days. The average time to post for multi-bureau recruitments is four business days; average for the current fiscal year to date for single-bureau recruitments is six business days.

Changes to Services and Activities

The FY 2019-20 budget includes a Direction to Develop a decision package which includes 1 FTE to support temporary, seasonal, and casual recruitments and administer background checks. WRT has a Direction to Develop an Americans with Disabilities Act (ADA) accommodations fund to support bureaus in hiring and retaining people with disabilities. The centralized ADA accommodation fund will support equitable and comprehensive professional growth opportunities for all employees, using consistent core competencies. WRT is currently conducting research to develop options for centralized administration of these services.

Workforce Recruitment and Training supports BHR's five-year Racial Equity Plan and Citywide equity goals related to racial and disability equity by ensuring that all training programs include an element of equity literacy, diversity, and cultural awareness. Training programs are being created through a collaborative effort which includes focus groups representative of a diverse and Citywide perspective. Additional high-quality training programs are currently offered both internally and through vendor partners. Evaluations will be provided to each training attendee to measure the delivery of racial and disability equity content. The objective of the trainings is to increase inclusivity and improve the employee experience.

In addition, WRT uses diversity recruitment strategies for all positions and will launch an employee lifecycle training in 2019 to focus on equity throughout the recruitment, selection, onboarding, and engagement phases of the employee journey. The training will be offered to all staff, with a focus on managers and supervisors.

WRT is responsible for the administration of the Project Search internship program which focuses on individuals with developmental disabilities (IDD). WRT will launch the Access to Work program in 2019 for people with disabilities. The program will partner with community organizations including vocational rehab to recruit people with disabilities to the City. The class specifications for the program are currently in development.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of diverse (protected class) applicants per fiscal year - female	41%	44%	45%	50%	100%
Percentage of diverse (protected class) applicants per fiscal year - minority	32%	32%	35%	35%	100%
Percentage of focused outreach program participants on an eligible list who are hired	27%	30%	35%	35%	50%
Number of qualified candidates in talent pool per high turnover classification opening	0	N/A	N/A	N/A	N/A
Number of qualified candidates in talent pool per open retirement eligible classification	0	N/A	N/A	N/A	N/A
Average time of complete recruitment	0	96	N/A	100	N/A

Explanation of Services

The Workforce Recruitment and Training team has identified opportunities through Citywide collaboration and creation of a gap analysis to strategically create and refresh existing training programs. This approach is consistent with BHR's efforts to ensure equitable outcomes, build talent pipelines for critical roles through the Path to Leadership program, and support continuous employee growth at all levels. The training offered will be highly interactive and will align with OMF's Strategic Plan and the City's racial equity goals. Training programs will be continually evaluated through both quantitative and qualitative data, as well as participant and stakeholder feedback to ensure meaningful, equitable, and relevant learning opportunities are provided.

Recruitment is a vital central resource to ensure equitable access and opportunity to City jobs. The program uses a consistent approach to recruitment that is tailored based on the nature of the position. In addition, the recruitment program produces data for both internal purposes and regulatory compliance.

WRT is responsible for the affirmative action program, centralized accommodations, diversity recruitment, community/academic partnerships with a focus on recruitment, and marketing the City as an employer locally and nationally. WRT provides strategic oversight and develops partnerships with bureaus to create equitable outcomes and experiences. WRT takes a Citywide view and, if needed, a bureau-specific lens to scale best practices. Concerted effort is required, and stable staffing is necessary to consistently deliver and evolve this program. The bureau-specific dashboards convey results and areas of opportunity. Large City bureaus have reserve resources to expend on materials and services that small bureaus do not have. This variance in budgets can impact the employee and candidate experience across bureaus and presents a challenge to the Employer Branding objective. This program ensures that hiring practices remain consistent across the City.

The output provides a consistent candidate experience and heightened visibility for Citywide opportunities. In addition, needs have been identified such as a Citywide apprenticeship program, improvements to the application process, and enhanced training. The current employment market requires that the City position itself strategically and generate hires as quickly as possible. In addition, the recruitment team is committed to reducing bias in the hiring process and is working to launch employee lifecycle training to reduce bias in selection.

Since the beginning of FY 2018-19, BHR representatives have attended 65 recruitment events and engaged with 1,210 attendees. WRT is launching a centralized accommodation system and anticipates a Citywide fund to provide accommodations to candidates and employees with disabilities. The lack of a central process has resulted in unnecessary barriers to employment. In addition, the program is educating the workforce and community members on data collection for self-identification. In spring 2019, the Disability Resources and Employment Specialist and Veteran Recruiter will launch a Citywide survey to identify the percentage of City employees who identify as a person living with a disability. WRT also facilities 'How to Apply' classes to teach community members the basics of applying for a City of Portland job.

Equity Impacts

WRT tracks the number of qualified applicants and hires who self-identify as being members of protected classes. As part of the central accommodation process, accommodation requests and fulfillment are tracked and reported in the HR dashboard.

It is the mission of WRT to ensure equal opportunity employment and ADA Title I is a significant focus. In addition, WRT is responsible for the Affirmative Action plan and reporting to the OFCCP.

All efforts and strategies in WRT focus on equity and diversity.

Changes to Program

WRT is committed to improving access to people with disabilities and would significantly benefit from a central accommodations fund. Job board postings are increasing in price due to demand. A bulk purchase model is being explored through the central accommodations model. The FY 2019-20 Adopted Budget includes $150,000 in one-time funds to establish a centralized accommodation fund for City bureaus to make ADA Title I accommodations for job applicants, candidates, interns and employees.

It is not anticipated that this program will be affected by the 1% constraint requirement. The Citywide Training program has been added to WRT to fortify the delivery of a talented and inclusive workforce and to support a consistent employee journey and increased retention.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	730,000
Internal Materials and Services	0	0	0	34,860
Personnel	0	0	0	1,858,454
Sum:	**0**	**0**	**0**	**2,623,314**
FTE	0	0	0	14.8

Resources: This program is mainly supported by General Fund Resources. However, the training program receives minimal revenue through registration fees to vendor sponsored trainings such as PCC Climb courses.

Implementation of a Citywide Training Fund would be beneficial to ensure equitable training and development opportunities. A centralized training budget would assure that all trainings provide an equitable, culturally sensitive message and delivery, eliminate duplicative processes, and create a process of collaboration and shared resources.

Expenses: Nearly all expenses for this program are from personnel services expenditures. The rest of the expenses are related to professional services for contracts and materials and services needed for recruitments and trainings.

Staffing: This program has a total of 14.8 employees for Workforce Recruitment and Training program. The positions are an Office Support Specialist III, HR Analyst I's, HR Analyst II's, and the Manager II classification.

Assets and Liabilities: This program does not have major assets or liabilities.

Program Information

Bureau: Office of Management & Finance
Website: portlandoregon.gov.bhr
Program Contact: Ashlie Grundy
Contact Phone 503-823-3514

Budget & Economics

Program Description & Goals

The City Budget Office (CBO) provides timely, accurate, and unfiltered information, analysis and recommendation regarding budgeting, forecasting, and fiscal policy issues to the Mayor, Commissioners, City Auditor, City bureaus, and the public. CBO coordinates the development of the City's budget, which includes analyzing operating and capital budgets, financial plans, and performance measures for each City bureau. Duties include monitoring expenditure and revenue trends of all City funds throughout the fiscal year, coordinating budget amendments, analyzing programs and policies, reviewing ordinances for fiscal impacts, providing fiduciary oversight of the General Fund, managing the City's enterprise-wide budget software system, and providing City Council with budget and policy recommendations. CBO strives to support bureaus and ensure that City leaders have relevant, objective analytical information to make informed investment decisions.

CBO's strategic goals include improving processes, analysis, deliverables, recommendations, and communication to positively impact Council decision making and public engagement. CBO works to achieve these goals using an equity lens, including co-managing the Budget Equity Tool with the Office of Equity & Human Rights, providing analysis and recommendations on progress toward Citywide racial and disability equity goals and creating different ways to interact with the City's budget. CBO also engages nearly half of the office in leading implementation of the bureau Racial Equity Plan, focused on ensuring equity, diversity, and inclusion in the populations CBO hires, the communities CBO engages in the budget process, and the lens analysts use in recommending investments in services Citywide.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Percentage of City KPMs with positive year-over-year results	45%	21%	48%	0	100%
Annual repair, rehabilitation, & replacement funding gap (Citywide)	$287,900,000	$310,000,000	$311,000,000	$310,000,000	0
Customer service rating (4 pt scale)	N/A	3.48	4.30	3.00	4.00
Percentage of GATR action items implemented	80%	82%	90%	100%	100%
Citywide asset condition summary	72%	67%	75%	100%	0
General Fund Excess Ending Balance (forecast accuracy)	$11,200,000	N/A	$10,000,000	$10,000,000	0

Explanation of Services

The majority of CBO staff work on Performance, Budgeting & Analysis functions in the office, coordinating and supporting the City's annual and supplemental budget processes, providing a variety of financial monitoring and analysis services, and managing the Citywide Performance Management program. CBO also provides the City's Economics & Forecasting function, preparing five-year revenue forecasts for each major fund, providing annual General Fund revenue forecasts and Current Appropriation Level (CAL) targets for each City bureau, and providing analysis and advice on other salient economic issues and trends. Additionally, CBO supports the Portland Utility Board (PUB). The PUB is a community oversight body for the Portland Water Bureau, the Bureau of Environmental Services, and City Council's management of these public utility bureaus.

This year, CBO oversaw the solicitation and implementation of a new enterprise budget software system. To enhance customer service and Citywide efficiency, CBO conducted and incorporated significant stakeholder feedback into project development and has provided robust training and support through implementation. CBO has also pursued several improvements to our communication materials and deliverables, adapting financial data to online dashboard visualizations to enhance informational accessibility to the public, and providing tailored briefing materials for members of Council.

Two of CBO's key performance measures relate to addressing the long-term financial risks presented by deteriorating City asset and infrastructure condition. CBO has enhanced the City's focus on achieving a long-term sustainable level of service through support and participation in the Build Portland Initiative, adopted by Council in September 2017. CBO works with City asset managers to reduce the annual repair, rehabilitation, and replacement funding gap, promoting investments that help the City achieve better service levels through improved asset conditions. CBO is unique in its provision of independent, publicly available analyses, which serve to inform and empower the public in critical financial issues facing the City. Additionally, CBO supports a panel of Citywide Community Budget Advisors, and co-hosts – with the Office of Community & Civic Life – budget engagement efforts that include public forums, hearings, and work sessions.

Equity Impacts

CBO's equity goals focus on ensuring equity, diversity, and inclusion in the populations CBO hires, the communities CBO engages in the budget process, and the lens analysts use in recommending investments in services Citywide. CBO ensures multi-lingual noticing, accessibility and translation services are available at all budget outreach events. However, CBO recognizes the need to take additional measures to empower diverse engagement with the budget process, and as a result is internally reprioritizing $10,000 within base budget resources to support outreach, engagement, and communication with historically and currently underrepresented communities.

Changes to Program

CBO managed several major process changes in FY 2018-19, and will focus on evaluating and improving these efforts in FY 2019-20. CBO's Requested Budget is lower in FY 2019-20 due to one-time budget software project funds primarily spent in FY 2018-19. As noted above, CBO is prioritizing $10,000 in existing resources to bolster our community outreach and engagement efforts especially for historically and currently underrepresented communities.

The Requested Budget also includes an increase of 0.5 FTE associated with the support of the Portland Utility Board (PUB), in response to a memo released by the PUB requesting additional support to carry out the distinct analytical and administrative functions required to support the PUB. The Requested Budget includes a total of 1.5 FTE - a part-time Principal Financial Analyst and a full-time program coordinator – to address these needs, which will be further refined in coordination with the PUB and the Utility bureaus during the budget development process.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	0	0	691,883	206,387
External Materials and Services	239,064	238,333	394,333	252,342
Internal Materials and Services	212,091	244,072	365,249	229,793
Personnel	1,927,281	1,978,947	2,030,338	2,599,030
Sum:	**2,378,436**	**2,461,352**	**3,481,803**	**3,287,552**
FTE	15	15	16	16.5

Resources: CBO operations are primarily supported by General Fund discretionary and overhead resources. The PUB support function is funded by the utility bureaus.

Expenses: The majority of CBO's budget – 83% - is for personnel costs. 9% of the budget funds internal services to support staff and operational costs, and the remaining 8% funds external materials and services associated with core operations, including a Hatfield Fellow and contracts for budget outreach facilitation and translation services.

Staffing: CBO's FY 2019-20 base budget includes 16.5 FTE, which includes 1.5 FTE for the Portland Utility Board. CBO is converting an internally-funded limited term Financial Analyst I to permanent to reflect current work practices, which does not affect the total FTE count. In FY 2017-18, CBO budgeted two new limited term positions; one associated with the budget software project will expire this fiscal year. The other, a Citywide Capital Analyst, began work in January 2019 and CBO will be requesting to extended the position into FY 2019-20 at no additional cost to complete their scope of work.

Assets and Liabilities: CBO's budget includes costs to partially cover ongoing maintenance of the Citywide budgeting software, the only asset CBO manages. With the need to acquire a new budget system this year, the cost of ongoing service and maintenance of this asset has increased. CBO is seeking $52,000 in additional resources from Council to cover the increased cost.

Program Information

Bureau: City Budget Office

Website: https://www.portlandoregon.gov/cbo/

Program Contact: Ryan Kinsella

Contact Phone 503-823-6960

Special Appropriations Youth Programs

Program Description & Goals

Education Programs for Youth.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

There are 2 youth programs that receive ongoing funding from the City. All Hands Raised and Future Connect. All Hands raised brings together leaders from education, business, government, culturally-specific and responsive organizations to ensure the success of every child in Portland and Multnomah County. Future Connect increases the ability of low-income and first-generation high school students in Portland access and succeed in higher education. Students receive support with enrollment and financial aid beginning in high school and have a college success coach who helps them to navigate the academic rigors of the college experience. Students also receive scholarship support to reduce the financial barriers to their postsecondary education.

Equity Impacts

Changes to Program

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	780,667
Internal Materials and Services	0	0	0	15,932
Sum:	**0**	**0**	**0**	**796,599**

Resources: Ongoing General Fund

Expenses: Funds are granted to All Hands Raised and Future Connect

Staffing:

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Sheila Craiag

Contact Phone 503-823-6863

Special Appropriations Internal Programs

Program Description & Goals

Special Appropriations receives ongoing and one time General Fund resources to fund internal ongoing programs City Membership and Dues, DCTU and COPPEA Professional Development, EBS charge for Special Appropriations, Open and Accountable Elections, annual appropriation per city code known as the Emergency Fund of the Council and one time finding for the FEMA Biological Opinion Compliance/Floodplain Management Update.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

These programs provide funding for memberships in various organizations to which the City subscribes as a municipality, funding per city code for Council to use in its discretion for any purpose it may deem proper or advantageous to the public welfare, training set aside for professional development for COPPEA and DCTU employees and a public campaign financing system to increase participation in City elections by both candidates and donors in order to prevent actual or perceived corruption in government. The one time allocation for the FEMA BiOp will partially fund a multi-bureau effort to begin implementing the detailed five-year plan and to move forward with off-site environmental mitigation and restoration programs.

Equity Impacts

Changes to Program

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	537	298,396	2,342,082
Internal Materials and Services	0	1,283	2,792	116,965
Personnel	0	5,738	0	240,198
Fund Expense				
Contingency	0	0	0	0
Ending Fund Balance	0	242,441	0	0
Sum:	**0**	**250,000**	**301,188**	**2,699,245**
FTE	0	0	2	

Resources:	Ongoing General Funding, One Time General Fund and a portion of the professional development is funding through bureau IA's.
Expenses:	2 FTE, Internal program expense and training for professional development.
Staffing:	2 FTE
Assets and Liabilities:	

Program Information

Bureau:	Special Appropriations	**Program Contact:**	Sheila Craig
Website:		**Contact Phone**	503-823-6863

Special Appropriations External Facing Programs

Program Description & Goals

Special Appropriations allocates ongoing and one time funding annually to external facing programs. Programs included in the external facing programs are VOZ, Janus Youth Village Market, Clean & Safe District, Cash Oregon, Mt Hood Cable Regulatory, Title 13, Gateway Center, Friends of Frog Ferry, Rose Festival Foundation, Portland United Against Hate, and Last Thursday.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

VOZ is a worker led organization that empowers diverse day laborers and immigrants to improve their working condition and protect civil rights through leadership development, organizing, education and economic opportunity. Janus Youth/Village Market provides an affordable healthy corner store in New Columbia. Clean & Safe provides resources to support the City's share of the downtown Business Improvement District. Funding for Clean & Safe supplements charges to downtown property owners. Funds are used for guides, marketing strategies, enhanced security and street cleaning in the downtown area. Cash Oregon provides resources to support free tax preparation services to low income and disadvantaged individuals throughout Portland and Multnomah County. Mt Hood Cable Regulatory provides cable regulatory and consumer protection services countywide. Title 13 funds administration of the City's Title 13 regulations for keeping bees and livestock in the City of Portland. Funding for the Gateway Center supports the program that transferred from the City of Portland to Multnomah County in FY 18/19. Last Thursday is an open streets event that happens on the Last Thursday evening of every month, June through August. All Portland families, artists, and neighbors are invited to enjoy the vibrant street scene, support local businesses and support the local art community. The Portland Bureau of Transportation manages the program. Special Appropriations funds .10 FTE to mange the operations of the event. Funding for the Friends of Frog Ferry will be used to complete a passenger water taxi feasibility study. Portland United Against Hate will fund another round of competitive grants as well as funding for a position in a PUAH-member organization to oversee the program. Funding for the Rose Festival Foundation is to help pay for festival operations.

Equity Impacts

Changes to Program

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,994,433	4,358,584	7,023,492	1,395,931
Internal Materials and Services	76,127	39,653	350,811	65,828
Personnel	350,408	346,579	710,185	0
Sum:	**4,420,968**	**4,744,816**	**8,084,488**	**1,461,759**
FTE	3	3	3	0

Resources: Ongoing and One Time General Fund

Expenses: Outgoing grants to community organizations and internal program staff.

Staffing:

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Shela Craig

Contact Phone 503-823-6863

City Arts Program

Program Description & Goals

In 2018 the City Arts Program (CAP) was established to oversee the City's contract with the Regional Arts & Culture Council (RACC), and to coordinate and align the City's various arts-related efforts. For a transitional period, CAP is sharing a CAL target of $4,218,084 and a one time allocation of $35,000 with RACC. This program offer (2 of 2) represents the CAP allocation of $199,002.

In 1995 the City helped establish RACC, an independent 501(c)(3) organization, to be the city's primary agent for accomplishing its arts and culture goals. Historically, these goals have been organized around three broad ideas: equitable access to the arts for all Portlanders; robust support for the creation and presentation of art, and reliable infrastructure that integrates art into the fabric of the city.

In pursuit of these goals, RACC's services have included public art, grants for artists and nonprofit organizations, arts education, technical assistance, cultural planning, fundraising and advocacy. Other agencies within the City also support the arts goals in a variety of ways, including through community art classes, zoning support for creative spaces, and by maintaining performance spaces.
As this is the first year of CAP, staff is still determining which performance measures will be most meaningful for indicating success. As an initial approach, data collection will be focused on indicators of successful contract management, such as compliance testing and progress reports.

Contribution to Equity Plan and Goals:

The nature of CAP's efforts provides frequent opportunities and ways to collaborate with employees and managers at all levels within the OMF organization, other City bureaus, City Council elected officials and their staff, and with outside stakeholders on outcomes that advance the Citywide Racial Equity Goals and Strategies Plan as well as OMF's Racial Equity Plan.

CAP will also work with RACC and other stakeholders to us a racial equity framework when measuring and articulating the impact of RACC's activities. This framework will inform further planning to advance the goal of eliminating racial inequity in supported arts services

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

CAP coordinates and aligns the City's arts-related efforts in achieve the City's arts goals.

This work is primarily undertaken by the City Arts Program Manager, an ongoing position established in the FY2018-19 budget to take on contract management, oversight and enforcement responsibilities; to develop an ongoing program for the City of Portland with agreed upon vision, goals, objectives and performance measures for arts and culture; and to serve as a single point of contact for City bureaus for arts and culture.

Through a combination of General Fund allocations, the Arts Education and Income Tax (Arts Tax) funds, and the City's public art program, which requires the City to dedicate 2 percent of the cost of certain capital projects to the creation of public art, the City of Portland contributes $5-8 million per year to support performing and visual arts and arts education in Portland. Most of these dollars are directed to the Regional Arts and Culture Council (RACC) for investment on the City's behalf, guided through contractual agreements between the City and RACC.

Since 1995, the City's contracts with RACC have been assigned to the City Arts Commissioner, a City Commissioner designated at the Mayor's discretion. No bureau assignment or formal contract management and oversight role has been included in the contracts, nor has the City had a consistent means of coordinating the City's own activities related to arts and culture with those of RACC. In response to a 2018 audit of the City's contract with RACC, OMF has been assigned the responsibility for managing the contractual relationship with RACC and the role of serving as the main point of contact for public art information, goals, policies, and practices for RACC, City bureaus, and other arts partners, as appropriate.

Key Activities:

-- Work with City Council, RACC, City bureaus and community partners to clearly define Portland's arts-related goals and objectives; recommend strategies to address multiple interests.
-- Create, manage, and implement a work plan for the City's arts and culture investments and programs; advise Council and bureau directors on recommended approaches and allocation of resources.
-- Serve as an external and internal point of contact for art-related matters at the City, including coordinating with multiple bureaus, particularly those that participate in the public art program.
-- Lead negotiation of, amendments to, and on-going management of contracts for the City's multi-million-dollar arts portfolio and program, consistent with adopted City goals and policies, and other applicable regulations. This includes working directly with RACC to support the successful implementation of City goals, while meeting the City's regulatory obligations with respect to funding for the arts.

Program results:

-Clearly articulated arts goals implemented through mutually embraced strategies that enable multiple bureaus, organizations, and groups to work together to accomplish shared objectives
-Improved transparency for the City's arts and culture investments
-City bureaus have a single knowledgeable source of information for arts and culture activities

Community engagement:

As a newly created program, a robust level of community engagement has not gone in to the creation or articulation of the services listed above. Over time, public engagement will be woven in to program planning and operation.

Equity Impacts

The primary equity impact of CAP is through the administration of the RACC Contract. Guided by the Citywide Racial Equity Goals & Strategies, a racial equity framework is used to set performance goals and a racial equity lens is used to measure progress.

Changes to Program

Organizational Structure and External Factors: The City Arts Program Manager, hired November 2018, is the primary staff position for CAP. The most significant external change is the appointment of a new Executive Director for RACC, Madison Cario. Cario succeeds Eloise Damrosch, who had served as Executive Director since 2004.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	58,500
Personnel	0	0	0	175,503
Sum:	**0**	**0**	**0**	**234,003**
FTE	0	0	0	1.1

Resources: Ongoing General Fund

Expenses: Primary expenses are staffing. Other expenses include contracting, personnel support, and overhead.

Staffing: 1 FTE
and .1 FTE

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Shoshana Cohen

Contact Phone 503-823-4466

RACC City Arts Program

Program Description & Goals

In 1995 the City helped establish the Regional Arts & Culture Council (RACC), an independent 501 (c)(3) organization, to be the city's primary agent for accomplishing its arts and culture goals. Historically, these goals have been organized around three broad ideas: equitable access to the arts for all Portlanders; robust support for the creation and presentation of art, and reliable infrastructure that integrates art into the fabric of the city. In pursuit of these goals, RACC's services have included public art, grants for artists and nonprofit organizations, arts education, technical assistance, cultural planning, fundraising and advocacy. In 2018 the city established a new City Arts Program, and for a transitional period that program is sharing a CAL target of $4,218,084 with RACC. This program offer (1 of 2) represents the RACC's allocation of $4,019,081 in ongoing resources and additional one time resources of $35,000 for Cultural Mapping. Portland derives a variety of benefits from the presence of artists, arts organizations and arts educators supported by RACC – including economic prosperity, vibrant neighborhoods, smarter students and a creative workforce. While some of these outcomes can be difficult to quantify, a series of performance measures help guide our work, including:

55 organizations now receive General Operating Support (GOS) from RACC. These groups combined have over $107 million in annual purchasing and payroll power, employ 3,000 artists and arts workers, and account for more than 1.7 million paid and free admissions every year. Over the last three years, the sector has grown by 12% and RACC has added 8 groups to the GOS cohort since 2015. We estimate we are now serving 80% of all eligible organizations in Portland, and plan to admit 3-4 new organizations each year until we are serving 100% of eligible groups.

In 2018, 162 nonprofit organizations and 158 individual artists received project grants and professional development support from RACC.

An additional 1,500 Portland artists and other residents benefited from RACC's technical assistance programs in 2018, including a wide variety of workshops, forums, networking events and one-on-one consultation services.

This school year, RACC is serving 29,630 students and 1,754 teachers in Portland through its arts integration program, The Right Brain Initiative.

RACC continues to leverage the city's investment with donations from the private sector. In FY2017-18, 1,800 donors (businesses, foundations and individuals) contributed more than $1.1 million to support RACC programs.

As Portland's designated agent for supporting the arts, RACC is committed to implementing the City's ambitious racial equity goals and strategies. We are focused on providing grants and services to artists and communities that have been marginalized and strengthening our community engagement skills in order to build authentic relationships with these groups. We know that equity requires diversity from within, and today 38% of our staff, 43% of our board, and over 50% of our grants and public art panelists identify as people of color. RACC supports the City's arts goals through the following programs:

GRANTS: This year, RACC will award $6.7 million in grants to artists and nonprofit organizations, which results in thousands of arts and culture experiences, including numerous free and reduced cost admissions. RACC grants support the general operations of 55 established organizations, as well as hundreds of publicly accessible arts events every year. The program also supports artists through project grants, professional development funding, and individual artist fellowships.

ARTS EDUCATION: RACC's arts integration program, The Right Brain Initiative, infuses culture, creativity and the arts into other subjects like reading, social studies, math, and science for more than 22,000 K-5 students in Portland. These students have better test scores in reading, math, and English, and are more likely to graduate from high school.

PUBLIC ART: The city's 2% for Art ordinance helps RACC expand the city's and county's vast

collection of over 2,200 public artworks, and general fund dollars support some administrative costs as well as the creation and maintenance of murals and other public artworks. Residents and visitors enjoy access to a free, well-maintained open-air museum of artworks created by local and international artists. WORKSHOPS AND TECHNICAL ASSISTANCE PROGRAMS: RACC provides workshops, forums, technical assistance and online resources that support Portland's creative community. Topics include grantwriting for artists of color; understanding contracts and copyrights; and Art of Leadership, a 6-month board training program. As a result, artists and arts administrators receive some of the support they need to live and create in a city that is becoming increasingly unaffordable.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

RACC supports the City's arts goals through the following programs:

GRANTS: This year, RACC will award $6.7 million in grants to artists and nonprofit organizations, which results in thousands of arts and culture experiences, including numerous free and reduced cost admissions. RACC grants support the general operations of 55 established organizations, as well as hundreds of publicly accessible arts events every year. The program also supports artists through project grants, professional development funding, and individual artist fellowships.
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PUBLIC ART: The city's 2% for Art ordinance helps RACC expand the city's and county's vast collection of over 2,200 public artworks, and general fund dollars support some administrative costs as well as the creation and maintenance of murals and other public artworks. Residents and visitors enjoy access to a free, well-maintained open-air museum of artworks created by local and international artists.
WORKSHOPS AND TECHNICAL ASSISTANCE PROGRAMS: RACC provides workshops, forums, technical assistance and online resources that support Portland's creative community. Topics include grantwriting for artists of color; understanding contracts and copyrights; and Art of Leadership, a 6-month board training program. As a result, artists and arts administrators receive some of the support they need to live and create in a city that is becoming increasingly unaffordable.
In addition to the services provided with ongoing funding an the budget includes $35,000 in one time General Fund discretionary to complete Phase 1 of the creation of a cultural databased and web platform to catalog and share information regarding the City's cultural assets. In Phase 1 the City will provide $35,000 to RACC to design database architecture and integrate existing datasets.

Equity Impacts

In February 2015, RACC adopted an Equity Statement to articulate the organization's equity philosophy and to signal its commitment to ensure equitable access to arts and culture for everyone in the region. In 2018, RACC adopted a Racial Equity Lens and four Equity Goals are that closely aligned with the City's Racial Equity Goals:

1. Remove disparities throughout RACC's programs and operations, and provide more opportunities and resources for communities of color along with other communities who RACC has historically underserved. (Citywide Equity Goal 1)
2. Strengthen outreach, public engagement, and access to RACC services for communities of color and other communities that RACC has historically underserved. We will support or change existing services inspired by promising practices and based on community input. (Citywide Equity Goal 2)
3. Provide training and professional development for our staff, board and volunteers, to ensure our team has the skills, knowledge, and experience to lead equity work within the organization and in the community. (Citywide Equity Strategy 2)
4. Build an organizational culture and operating systems that support our equity work and hold the organization accountable. (Citywide Equity Strategy 6)

RACC is in the process of changing the way it allocates grant funds to achieve the RACC and City goal of strengthening access to services for communities of color and immigrant and refugee communities. These changes will result in a more equitable system that provides stronger support for smaller and midsized organizations by capping the amount of unrestricted support going to the city's largest arts organizations with budgets of $5 million or more. We have also established new criteria to help arts organizations that are doing meaningful work on equity, diversity inclusion and access receive more funding, rather than calculating their grant award amount based on the size of their budget alone.

RACC collects and tracks disaggregated demographic data from all grant applicants, public art applicants, panelists, board members and staff. In 2018:

40% of RACC board and staff members identified as people of, color, 50% of RACC grant and public art panelists identify as people of color, 38% of the individual artists who received grant funding identified as people of color 50% of the artists who received public art commissions or whose work was purchased by RACC identified as people of color

RACC requires all grant recipients to present their performances, exhibits and community events in spaces that are fully accessible to people with disabilities.

Changes to Program

Changes to Program
RACC's new Executive Director is Madison Cario. RACC will partner with the City to align objectives and activities to achieve the City's arts goals and conduct a comprehensive strategic planning process over the next 18 months.
For FY19-20, RACC's ongoing special allocation base amount is escalated 4%, and then reduced by 1%. Also, $199,002 is being reallocated away from RACC and into to the City Arts Program, resulting in an overall reduction to RACC's budget of $77,737 in FY20. Significant changes to the RACC's budget include:
- Grants, RACC's largest budget category, are reduced by 5% (-$97,358). Projected increases in other revenue sources, including the Arts Tax, will mitigate negative impacts on grantees, but the reduction will mean slower growth in grant funds than anticipated.
- Workplace Giving is reduced 16% (-$58,826), representing changes to the program after the City did not renew one-time funds for $200,000 matching challenge grant. The impact of this change is a reduced capacity for RACC to raise private sector revenue (estimated loss of an additional $100,000) for RACC and RACC-funded organizations.
- Arts Education is increased 54% ($52,480) proportional to Portland Public Schools' participation in The Right Brain Initiative. RACC anticipates serving an additional 700 students at two PPS schools next year.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	4,019,081
Sum:	**0**	**0**	**0**	**4,019,081**

Resources: Ongoing and One Time General Fund

Expenses: The primary expense for this program is Grants, which represent 44% of the total Special Appropriation. More information about the impacts of the changes to this year's expenses can be found in the 'Changes to Program' section.

Staffing:

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Shoshana Cohen

Contact Phone 503-823-4466

East Portland Action Plan

Program Description & Goals

This program support advocacy efforts of the East Portland Action Plan.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

The East Portland Action Plan (EPAP) acknowledges community strengths and support existing efforts, while looking strategically at opportunities to improve livability and at policies to address some of the challenges facing East Portland. The EPAP committee was convened by the City of Portland for the specific task of providing "leadership and guidance to public agencies and other entities on how to strategically address community-identified issues and allocate resources to improve livability for neighborhoods in the East Portland Community Office (EPCO) coalition area."

Equity Impacts

EPAP recognizes that in order to engage people of color, immigrants, refugees, low income families and people with disabilities programming needs to be accessible by providing accommodations in accordance with ADA (Americans with Disabilities Act) Title II as well as language interpretation and translation in accordance with Civil Rights Act Title VI. Additionally, childcare and food for meetings taking place over a mealtime are provided because the program recognizes these are barriers to engagement for low income families. Aside from the accommodations EPAP is intentional about reaching out to the diverse communities in East Portland to advocate for improved livability and to prevent involuntary displacement. There are no changes in program delivery for EPAP from FY18-19 to FY19-20.

Changes to Program

In FY 19-20, EPAP is transitioning from the Office of Community & Civic Life to the Bureau of Revenue and Financial Services, with programmatic oversight from the Office of Commission Position No. 4, currently held by Commissioner Eudaly.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	190,386
Internal Materials and Services	0	0	0	22,400
Personnel	0	0	0	115,884
Sum:	**0**	**0**	**0**	**328,670**

Resources: Ongoing General Fund

Expenses: Outgoing Grants and internal program expense including 1FTE.

Staffing: 1 FTE, located in the Commissioner of Public Safety's Office.

Assets and Liabilities:

Program Information

Bureau:	Special Appropriations	**Program Contact:**	Sheila Craig
Website:		**Contact Phone**	503-823-6863

Portland Committee on Community Engaged Policing

Program Description & Goals

This program supports a public, independent committee that reports to the Mayor. This committee is a new configuration of the COAB that was previously formed under the DOJ settlement agreement. This year the program focused on recruiting and selecting members and training PCCEP members. The first PCCEP public meeting was held in November so there are no previous years of activity. Participation and completion of tasks assigned through the DOJ Settlement and other advisement sought by the Mayor are the key data points for measuring success. This program is not connected to a bureaus' 5-year Racial Equity Plan but supports city-wide goals of inclusive public involvement.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

In Dec. 2012 the DOJ found that that PPB engage in a pattern or practice of unnecessary or unreasonable force during interactions with people who have or are perceived to have mental illness. The City reached a Settlement Agreement that included a community oversight component. That Committee was redefined in 2017 and relaunched as the PCCEP. The PCCEP is charged with responding to PPB's Community Engagement Plan and other policies as requested. The Committee is also focused on issues of profiling and overrepresentation of people of color in interactions with PPB. The program supports the functioning of the PCCEP. It is critical that the committee exist as an independent community voice for input into PPB activities, policies and procedures. Robust community engagement with people living with mental illness and communities of color is designed to improve PPB service and interaction with these communities.

Equity Impacts

This program is specifically focused on improving service and interactions between PPB and communities of color and people living with mental illness, which is a disability.

Changes to Program

The program added 1 FTE/Administrative Coordinator position

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	555,060
Internal Materials and Services	0	0	0	25,003
Personnel	0	0	0	314,217
Sum:	**0**	**0**	**0**	**894,280**
FTE	0	0	0	768

Resources:	Ongoing General Fund
Expenses:	Fixed expenses include rental of an office that is also used for PCCEP subcommittee meetings, personnel costs, M&S costs, stipends for committee members, food and venue costs for meetings. Discretionary expenses include contracting with outside consultants for facilitation and other tasks.
Staffing:	2.0 FTE Program Coordinators and funding for a Senior Policy Advisor located in the Mayor's Office.
Assets and Liabilities:	

Program Information

Bureau:	Special Appropriations	**Program Contact:**	Judith Mowry
Website:		**Contact Phone**	503-823-4331

Portland'5 Centers for the Arts Special Appropriation

Program Description & Goals

This program offer covers the City's ongoing Special Appropriation paid to Metro for support of the Portland'5 Centers for the Arts (P'5), formerly know as Portland Center for the Performing Arts (PCPA). P'5 facilities are City owned and operated by Metro under the direction of the Metro Exposition and Recreation Commission (MERC). The City's obligation to this support is found in Section 5 of the Agreement Regarding Consolidation of Regional Convention, Trade, Spectator and Performing Arts Facilities Owned and Operated by the City of Portland and Metro, which was established in 1990 and amended in 1992, 2000 and 2013.

The funds are used to support the operations and capital needs at the venues and to enable them to continue to provide performing arts venues to a wide range of users. The amount of the City's obligation under the Agreement escalates annually by the Consumer Price Index (CPI).

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

P'5 consists of three separate buildings: the Keller Auditorium, the Arlene Schnitzer Concert Hall, and the Antoinette Hatfield Hall which houses Newmark Theatre, Dolores Winningstad Theatre, and Brunish Theatre.

The facilities serve as the home performance venue for five resident companies (Portland Opera, Oregon Ballet Theater, Oregon Symphony, Oregon Children's Theater, and Portland Youth Philharmonic) and hosts five presenting arts organizations (White Bird Dance, Stumptown Stages. Portland Arts and Lectures (Literary Arts), Metropolitan Youth Symphony, and Broadway in Portland). In addition, Portland'5 began presenting events independently for the first time in FY 2014-15, which allowed the venues to diversify income streams, expand business opportunities, welcome new and emerging performers, and engage new audiences. P'5 free event series bring local, national and international performers to the theaters and streets of Portland, entertaining thousands and include: Music on Main Street; Summer Arts on Main; Noontime Showcase; and Poets on Broadway.

The venues host over 1,000 music, theater, dance, and lecture performances each year, draw over one million patrons to downtown Portland's Cultural District and generate an average of $60 million in regional spending every year. P'5 assesses its impact on the economy annually; from FY 2014-15 to FY 2016-17, Portland'5 total spending increased from $82.3M to $104.4M and P'5 jobs increased from 840 to 1,050.

P'5 have an active education and engagement program that helps fulfil their commitment to celebrating diversity and broadening access to the performing arts for people of all means, cultures, and ethnicities.

Equity Impacts

The P'5 Education Program seeks to remove barriers and provide access to a diverse selection of world-class lectures and performing arts by offering free performances in the venues and in the community, career shadow opportunities, summer internships, and curriculum support. The Education Program intentionally seeks and supports teachers and students in Title-I schools to enhance the education and arts experience by providing curricular materials that connect what students see on the stage with what they experience in the classroom.

P'5 offers a range of accommodations for people with disabilities who are attending events and is actively working with City staff in the Spectator Venues Program to remove ADA barriers identified in the City's ADA Transition Plan.

Changes to Program

The City's obligation to provide this support is found in Section 5 of the Agreement Regarding Consolidation of Regional Convention, Trade, Spectator and Performing Arts Facilities Owned and Operated by the City of Portland and Metro and is not expected to change in the foreseeable future. The Spectator Venues Program provides staff liaison services to P'5 and the Spectator Venues and Visitor Activities Fund is authorized to expend funds on financial planning and contract administration and oversight for P'5.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	882,760	1,936,832	948,617	1,881,473
Internal Materials and Services	135,739	70,024	67,584	0
Personnel	110,250	68,648	90,000	0
Fund Expense				
Contingency	0	0	0	0
Sum:	**1,128,749**	**2,075,504**	**1,106,201**	**1,881,473**

Resources: Ongoing General Fund

Expenses: External Services contract with Metro

Staffing:

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Susan Gibson-Hartnett

Contact Phone 503-823-6958

Office of Youth Violence Prevention (OYVP)

Program Description & Goals

The Office of Youth Violence Prevention (OYVP) was created on July 17, 2006. OYVP reflects priorities identified by City Council to build a more family-friendly city and increase public safety and reflects the emphasis on attacking the root causes of problems in neighborhoods, rather than simply focusing on policing efforts.

OYVP coordinates with pro-social resource services, provides and manages grant funding and enjoins the community in problem solving. OYVP offers research information and facilitates communication associated with best practices and grant funding opportunities to supplement local resources. OYVP works with city bureaus, county, state and federal services, business, schools, and the faith community to provide consistent policy input, guidance, and advocacy to address youth violence.

OYVP facilitates the bi-weekly Community Peace Collaborative Public Forum which seeks to inform community, increase communication and coordinate resources and expertise to reduce the many forms of violence, and crime.

OYVP serves in co-chairing the Multnomah County Local Public Safety Coordinating Council Youth and Gang Violence Subcommittee. The subcommittee is committed to collaborating and communicating across systems and with affected communities. The subcommittee's vision is a violence-free, opportunity-rich future for every member of our community. Its mission is to reduce youth and gang violence, reduce related disproportionate minority contact, and lessen the disproportionate negative impacts of gang violence on communities of color. The subcommittee implemented and completed the Multnomah County Comprehensive Gang Assessment in 2013 / 2014. The resulting strategic plan was approved by the LPSCC Executive Committee in 2017. The plan serves to align City and County intervention and prevention programming based upon nationally recognized and recommended program models. All OYVP programming supports and aligns with the approved plan.

OYVP collaborates with communities and institutions to eliminate racial inequity. OYVP supports the City's 5 Year Racial Equity Plan through the facilitation of the bi-weekly Community Peace Collaborative Public Forum (CPC), additionally by serving as a stakeholder at the bi-weekly held Interfaith Peace and Action Collaborative (IPAC) and other community meetings. Finally, OYVP through the provision of grant funding and the selection of programming models continues to strengthen outreach, public engagement, and access to City services for communities of color, as well as immigrant and refugee communities.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

The Office of Youth Violence Prevention (OYVP) reflects priorities identified by City Council to build a more family-friendly city and increase public safety and reflects the emphasis on attacking the root causes of problems in neighborhoods, rather than simply focusing on policing efforts.

OYVP serves as grant manager for the following pro-social resource programs: Street Level Gang Outreach (SLGO); Gang Impacted Family Team (GIFT) Coordinator; and Restorative Justice Program. The grant programs provide pro-social resources to at risk youth, and their families, creating an investment in Portland's livability and economic future.
Youth being served through OYVP managed programming are persons 25 years or younger. Grantee organizations include: Immigrant and Refugee Community Organization (IRCO), Latino Network, Native American Youth and Family Center (NAYA), Portland Opportunities Industrialization Center (POIC), and Resolutions Northwest. These grantee organizations provide a multitude of culturally specific services to Portland's youth and families through the listed OYVP grant programs.

SLGO workers build relationships with youth and their families with specific goals in mind: to reduce conflict and violence, to support and assist youth and their families in accessing social and educational services, while providing services as a mentor, life coach, positive role model, advocate, and mediator. SLGO workers funded by OYVP provide service City wide while coordinating services with SLGO workers funded through the Bureau of Parks and Recreation, TriMet and the City of Gresham. OYVP hosts weekly meetings for all SLGO serving in the Portland and Gresham area to assist in the alignment of services.

GIFT is a collaborative multi-disciplinary team involving City, County, State and private non-profit organization services. The team was created to provide pro-social service support for youth and families to break intergenerational ties that perpetuate gang involvement and violence within the community. The GIFT Team meets monthly. OYVP is a GIFT stakeholder service. The GIFT coordinator connects client resources and need for resources with SLGO workers, clients receiving treatment at Legacy Emanuel Hospital, and HEAT reentry program. The GIFT Coordinator is a member of the LPSCC Youth and Gang Violence Subcommittee and Multnomah County Sex Trafficking Collaborative.

In school year 2016-2017 to date in 2018-2019 grantee organization Resolutions Northwest Inc. (RNW) has provided Restorative Justice implementation planning and support at the district level of the Parkrose School District. The focus has been to offer professional development to administrators, teachers and staff to build capacity within the system to effectively reduce disproportionate exclusionary practices that impact students of color. In school year 2017-2018 59 combined meetings, trainings and events were conducted by RNW with school administrators, teachers, and students.

OYVP in addition provides small grants, under $5000, sponsoring pro-social culturally specific programming for youth involving education, mentoring, and recreation opportunities.

Additionally, OYVP has provided funding to the post incarceration / reentry program entitled HEAT (Habilitation, Empowerment, Accountability, Therapy) through Volunteers of America Oregon (VOA). The funding provides incentive for HEAT program enrolled clients, to encourage those clients to complete the 9-month program. OYVP, Multnomah County Parole and Probation, and GIFT Coordinator are stakeholder services assisting VOA with the HEAT program.

OYVP coordinates with the Multnomah County Court, Multnomah County District Attorney's Office, faith and community leaders in providing court probation clients with pro-social mentoring meetings as a client elective. 8 probation clients have contacted OYVP and been aligned with community mentors to date in FY 2018-2019.

Since OYVP has aligned service models and methods of service delivery through LPSCC's Youth and Gang Violence Subcommittee a substantial reduction in gang related gun violence has occurred. The Portland Police Bureau investigated 193 incidents of this type in 2015. In 2018 110 cases of this type were investigated, resulting in a 43% reduction in these cases, many of which

have involved youth of color as victims. OYVP is continuing to research new pro-social service delivery methods which will continue to offer future reduction in youth and gang related violence.

OYVP facilitates the bi-weekly Community Peace Collaborative Public Forum, the mission of which is to increase communication and coordination among services and community to further the development of solutions, interventions and prevention strategies to reduce violence. OYVP attends the bi-weekly community led and facilitated Interfaith Peace and Action Collaborative (IPAC). IPAC's purpose is to gather as members of faith, community, business, and law enforcement to discuss and create action to improving police/community relations and impact the criminal justice system at-large to ultimately ensure real justice for all.
Through the two listed reoccurring meetings community members enjoin in dialogue, while seeking solutions for the reduction of gun-related and other types of violence, better enabling OYVP to match service to community expressed need.

Equity Impacts

Programming managed by OYVP supply pro-social resources and services to communities of color and the underserved.

OYVP's grant managed programs provide culturally specific services to communities of color and those underserved.
OYVP provides reoccurring community engagement opportunities for communities of color, while networking public concerns with public and private resources through the facilitation of the Community Peace Collaborative Public Forum. Additionally, OYVP provides facilitation and or enjoins as a stakeholder in meetings or events supporting communities of color. OYVP small grant funding (under 5K) sponsors private non-profit organizations offering programming to youth of color. Eight small grants were provided during FY 2017-2018. In FY 2018-2019 to date OYVP has provided 2 grants, with 3 in process to date.

Listed grantee organizations (IRCO, Latino Network, NAYA, POIC, Resolutions Northwest) are equal opportunity employers, and honor their obligations under the Americans with Disabilities Act (ADA) and state disability laws.

Changes to Program

The FY 2019-20 Adopted Budget includes $100,000 in one-time General Fund discretionary resources to expand a contract, managed by the Office of Youth Violence Prevention, with California Partnership for Safe Communities (CPSC) for training and technical assistance to utilize a Ceasefire approach in Portland. CPSC works with cities to achieve sustainable community-wide reductions in violence. This project seeks to reduce gun related violence through enhanced coordination between the Portland Police Bureau, Portland Street Level Gang Outreach, and Gang Impacted Family Team Coordinator programs; improvement of the Shooting Review process; support for the Office of Youth and Violence Prevention to incorporate Ceasefire's intensive life coaching model into existing services; and development of additional ongoing public funding to support violence reduction work.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	77,002	44,815	56,584	893,341
Internal Materials and Services	5,126	613	34,162	27,175
Personnel	0	0	0	267,004
Sum:	**82,128**	**45,428**	**90,746**	**1,187,520**

FTE	0	0	2

Resources: Ongoing General Fund

Expenses: Internal expense to cover program staff. External expense outgoing grants.

Staffing: 2 FTE

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Tom Peavy

Contact Phone 503-823-4180

Citizen Utility Board Bill Insert

Program Description & Goals

In January 2014, the City engaged the Citizens Utility Board of Oregon to act as an outside, independent advocate on behalf of the City's residential ratepayers. In recognition of CUB's independent status, CUB receives no direct support from the City for this work. Twice a year, the City sends a bill insert to all Water Bureau account holders, describing its partnership with CUB and encouraging Portlanders to learn more about the organization's work.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
There are no performance measures associated with this program	N/A	N/A	0	N/A	N/A

Explanation of Services

Bill inserts to all Water Bureau customers.

Equity Impacts

Changes to Program

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	10,578	10,828
Sum:	**0**	**0**	**10,578**	**10,828**

Resources: Ongoing General Fund

Expenses: Internal printing and shipping expense for water bill inserts.

Staffing:

Assets and Liabilities:

Program Information

Bureau: Special Appropriations

Website:

Program Contact: Sheila Craig

Contact Phone 503-823-6863