

FINANCIAL IMPACT STATEMENT
For Council Action Items
(Use this form for Ordinances and Resolutions)
(Deliver original to Financial Planning Division. Retain copy.)

1. Name of Initiator Jennifer Karps Dan Vizzini	2. Telephone Number JK - 32236 DGV - 34038	3. Bureau/Office/Dept. Environmental Services
4a. To be filed (date) October 19, 2009	4b. Calendar (Check One) Regular Consent 4/5ths [XX] [] []	5. Date Submitted to FPD Budget Analyst: October 5, 2009

1) Legislation Title:

Authorize the Grey-to-Green Treebate Program (Ordinance)

2) Purpose of the Proposed Legislation:

In July 2008, the Bureau of Environmental Services launched the Grey to Green Program, a comprehensive set of initiatives to restore and protect the health of Portland watersheds. Trees are an essential component of the Bureau's Grey to Green Program. Trees deliver significant and cost-effective stormwater management benefits. The Treebate Program provides a small financial incentive to encourage property owners to plant yard trees. The ordinance establishes the program through Fiscal Year 2012-2013 and establishes basic administrative rules for its implementation.

3) Revenue:

Will this legislation generate or reduce current or future revenue coming to the City? If so, by how much? If new revenue is generated identify the source.

The Portland Grey-to-Green Treebate Program is authorized to issue utility bill credits and incur administrative expenses not to exceed \$1,080,000 in aggregate through FY 2012-2013. In addition to the Treebate Program, yard trees qualify for discounts on stormwater management user service charges under the Clean River Rewards Program. In order to qualify, a residential property must have at least 4 mature trees onsite. It is possible that the total Clean River Reward discount attributable to new trees planted in response to the Treebate could be \$170,000 per year by FY 2012-2013. This assumes 20,000 properties qualify for the Clean River Rewards as a result of qualifying for the Treebate Program.

4) Expense:

What are the costs to the City as a result of this legislation? Include costs in the current fiscal year as well as costs in future years. If the action is related to a grant or contract include the local contribution or match required.

The Treebate Program is expected to cost no more than \$1,080,000 through FY 2012-2013. This amount includes expenditures for marketing, outreach and administration, as well as



CITY OF PORTLAND ENVIRONMENTAL SERVICES



1120 SW Fifth Avenue, Room 1000, Portland, Oregon 97204 ■ Dan Saltzman, Commissioner ■ Dean Marriott, Director

City Council
Agenda Item
Staff Supplemental Report

TO: Commissioner Dan Saltzman

THROUGH: Matt Grumm or Amy Trieu

FROM: Dean Marriott

DATE: October 19, 2009

RE: Grey to Green Initiative. Treebate Program

Requested Council Hearing Date:

I. RECOMMENDATION

Authorize the Grey-to-Green Treebate Program.

II. BACKGROUND

In July 2008, the Bureau of Environmental Services launched the Grey to Green Program, a comprehensive set of initiatives to restore and protect the health of Portland watersheds.

Trees are an essential component of the Bureau's Grey to Green Program. Trees deliver significant, cost-effective, stormwater management benefits to the City and utility ratepayers.

The Treebate Program provides a small financial incentive to encourage property owners to plant yard trees. The Bureau will provide one-time utility bill credits equal to 50% of the cost of each yard tree, with a maximum of \$50 per tree for qualifying native species, and \$40 per tree for all other qualifying species. Trees on the City's Nuisance Plant List are not eligible.

The proposed ordinance establishes the program through April 30, 2013 and establishes basic administrative rules for its implementation.

III. FINANCIAL IMPACT

The Bureau may grant Treebates through June 30, 2013. The total cost of the program, including marketing, outreach and administrative support, will total no more than \$1,080,000. The Bureau's financial plan and projected stormwater management user service charges already reflect the cost of Treebates through FY 2012-2013. In order to minimize administrative overhead, the Bureau will process Treebates as a credit to City utility bills. Rather than expensing the Treebate against an appropriation, the Bureau will be reducing stormwater management user service charge revenue by the amount of one-time credits granted by the program. In addition, the Bureau will rely on existing revegetation program staff to administer the Treebate Program.

IV. LEGAL ISSUES

There are no legal issues associated with this proposed program.

V. CONTROVERSIAL ISSUES

The Bureau has not encountered any controversial issues in the development of this program. The program is consistent with existing City policies and program initiatives relating to watershed management, stormwater management, habitat restoration, yard and street trees, and the control of invasive species. The program is available to all classes of property throughout the City.

VI. LINK TO CURRENT CITY POLICIES

Grey to Green is fully integrated into the Bureau's goals, missions and policies to manage stormwater runoff and advance the health of Portland watersheds.

VII. CITIZEN PARTICIPATION

The development of the Treebate Program has been informed by extensive Bureau outreach and engagement of property owners through such activities as the Downspout Disconnection Program, Clean River Rewards Program, and Sustainable Stormwater Program, as well as recent survey research performed for the Stormwater Marketplace Program and Tabor to the River. These outreach and research efforts identified the potential benefits of using limited incentives to motivate private investments, and described a percentage of Portland residents who are ready and willing to take additional action to advance City stormwater management and watershed health goals.

VIII. OTHER GOVERNMENT PARTICIPATION

The Bureau will continue to work closely with the Parks Bureau and Urban Forestry Commission to ensure that the Grey to Green Treebate Program is aligned with the Urban Forestry Management Plan.

IX. FINANCIAL IMPACT ON LOCAL ECONOMY

IF APPLICABLE, PROVIDE INFORMATION ON ESTIMATED NUMBER OF JOBS CREATED BY THIS ACTION

The Bureau does not expect to generate an increase local employment as a result of this program. However, the Bureau expects to drive additional retail customers to local nursery and garden supply businesses as a result of the financial incentive to plant yard trees. To this end, the Bureau is working, on a pilot basis, with several local businesses, to promote the Treebate through the use of point-of-purchase advertising and informational materials.

IF THIS ACTION IS CONTRACT-RELATED, PROVIDE INFORMATION ON M/W/ESB PARTICIPATION (NUMBER AND PERCENTAGE)

Not applicable.

X. IF THIS IS A CONTRACT, DOES CONTRACTOR HAVE A CURRENT BUSINESS LICENSE? _____ WHAT IS THEIR BUSINESS LICENSE NUMBER? _____ IS THEIR ACCOUNT WITH THE CITY CURRENT? _____ IF NOT, HOW MUCH IS OWING? _____

Not applicable.

discounted stormwater management user service charges for ratepayers who qualify for Treebates. The Bureau's financial plan and projected stormwater management user service charges already reflect the cost of the Treebates through FY 2012-2013.

5) Staffing Requirements:

a) Will any positions be created, eliminated or re-classified in the current year as a result of this legislation? *If new positions are created include whether they will be part-time, full-time, limited term or permanent positions. If the position is limited term, indicate the end of the term.*

No.

b) Will positions be created or eliminated in future years as a result of this legislation?

No.

6) Change in Appropriations: Budget changes for the current year must go through the BMP Process. This section may only be use with prior permission of your OMF analyst for exceptions. *Reflect the dollar amount to be appropriated by this legislation. Include the appropriate center codes and accounts to be used by Central Accounting. Indicate "new" in Center Code column if new center needs to be created. Use additional space if needed.*

Fund	Center Code	Account	Amount	Project Fund	Project No.


 Dean Marriott, Director, Bureau of Environmental Services

APPROPRIATION UNIT HEAD (Typed name and signature)

TREEBATE

Plant a tree for clean rivers and get a rebate

**Submit a treebate
request form
with your
proof of
purchase to:**

Environmental Services Treebate
1120 SW 5th Avenue, Room 1000
Portland, Oregon 97204

Fax: 503-823-6995
Call: Jennifer Karps at 503-823-2263
Email: Jennifer.Karps@bes.ci.portland.or.us

www.portlandonline.com/bes/trees

www.workinggreenportland.com

Treebates will be posted
as a credit to
your city utility bill.

Planting your tree

Before digging,
call Dig Safely Oregon
1-800-332-2344 to locate
underground utilities.

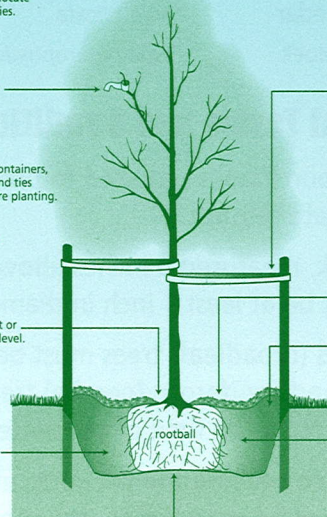
Remove any twine,
tape or tags.

Carefully remove containers,
wrappings, wires and ties
from rootball before planting.

Loosen outside
roots, and unwrap
any circling roots.

Set base of trunk at or
just above ground level.

Dig a hole at least
two times the
rootball diameter.



Set the rootball on undisturbed
soil to prevent settling.

Watering:
Water deeply once a week during the first two summers.
Apply a minimum of 5-10 gallons each week.

Stake tree only if
tree feels unstable.

Secure stakes with
wide flexible
material such as
webbing straps
or chainlock ties.
Allow for some
tree movement.

Apply 3-4" layer of
mulch. Keep 2-3"
from tree trunk.

Create a 5-6" high
soil berm to
contain water.

Backfill with existing
soil the from hole.
Tamp lightly as you
fill in the hole.

*Every tree
planted in Portland
contributes to a
cleaner Willamette
River. So, if you plant
a tree on your Portland
residential property,
Environmental
Services will credit
your city utility bill for
half the purchase
price per tree up
to \$40 (up to \$50 per
tree for native trees).*



ENVIRONMENTAL SERVICES
CITY OF PORTLAND
working for clean rivers



183307

Plant a tree for clean rivers - and get a rebate

How to Get Your Treebate

- 1 Purchase an eligible tree (lists and terms below).
- 2 Plant it at a residence in the City of Portland.
- 3 Complete and submit the attached form by **May 1, 2010**. Include the tree purchase receipt with the purchase price circled.
- 4 Receive a credit on your utility bill. (50% of purchase price up to \$40, \$50 if native tree).

Protect Your Investment

Late fall through early spring is prime tree planting season. Be sure to plant your tree correctly and give it proper care and maintenance. Newly planted trees require deep weekly watering (5-10 gal.) during the dry summer season from June through September.

Ineligible Trees - No treebates given for:

- ✓ trees planted through Friends of Trees
- ✓ trees planted to satisfy a condition of development or mitigation
- ✓ trees on the city Nuisance Plant List below:

Norway maple	<i>Acer platanoides</i>
Tree of heaven	<i>Ailanthus altissima</i>
White poplar	<i>Populus alba</i>
Cutleaf birch	<i>Betula pendula laciniata</i>
English holly	<i>Ilex aquifolium</i>
Siberian elm	<i>Ulmus pumila</i>
Golden chain tree	<i>Laburnum watereri</i>
Princess tree	<i>Paulownia tomentosa</i>
English laurel	<i>Prunus laurocerasus</i>
English hawthorn	<i>Crataegus monogyna</i>
Sweet cherry	<i>Prunus avium*</i>
Black locust	<i>Robinia pseudoacacia*</i>
European mountain ash	<i>Sorbus aucuparia*</i>

(*exceptions are cultivars and varieties)

Native Trees

Tree species native to the Portland area are well suited to our climate, and planting native trees helps create habitat connections throughout the city. Native tree species include:

Bigleaf maple	<i>Acer macrophyllum</i>
Grand fir	<i>Abies grandis</i>
Red alder	<i>Alnus rubra</i>
Pacific madrone	<i>Arbutus menziesii</i>
Pacific dogwood	<i>Cornus nuttallii</i>
Oregon crabapple	<i>Malus fusca</i>
Ponderosa pine	<i>Pinus ponderosa</i>
Bitter cherry	<i>Prunus emarginata</i>
Douglas-fir	<i>Pseudotsuga menziesii</i>
Oregon white oak	<i>Quercus garryana</i>
Cascara buckthorn	<i>Rhamnus purshiana</i>
Western redcedar	<i>Thuja plicata</i>
Western hemlock	<i>Tsuga heterophylla</i>

Additional Terms and Conditions

- ✓ Proof of purchase is required to process the treebate request.
- ✓ Tree trunk, measured 6 inches above the soil line, must be at least 1 inch in diameter.
- ✓ Deciduous (broadleaf) trees must be at least 6 ft. tall and coniferous (needle) trees must be at least 4 ft. tall at time of purchase.
- ✓ Submissions become the property of the city and will not be returned to the applicant.

Go to www.portlandonline.com/bes/trees for tree planting and establishment resources, and additional treebate forms.
 For more information call: Jennifer Karps at 503-823-2263 or email: Jennifer.Karps@bes.ci.portland.or.us

Treebate FORM

Only complete, signed forms will be processed.

Utility Account #: _____

(find in the top right corner of your city utility bill)

Name: _____

Mailing address: _____

city/state/zip: _____

Portland address where tree is planted (if different):

Phone (optional): _____

Email (optional): _____

Type of tree: _____

Not sure what type of tree

Name of business where tree was purchased:

Cost of tree: \$ _____

My proof of purchase is attached

Tree height: _____ ft. Tree trunk diameter: _____ in.

I planted the tree in my: (choose one)

Front yard Side yard Back yard

Tree Care Pledge and Permission to Post Online

I agree to care for this tree and water it for at least two years. A City of Portland representative may make a site visit to verify this application.

I acknowledge that submission of this form authorizes the City of Portland to include my tree in a public database at www.workinggreenportland.com.*

Signature and date

(*The goal of workinggreen is to help Portlanders learn about actions they can take on their properties to manage stormwater and build a more sustainable city.)

✂ fill in, cut off and mail back with your proof of purchase