



CITY OF PORTLAND
OFFICE OF MANAGEMENT AND FINANCE

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November 26, 2012

To: Mayor Sam Adams
Commissioner Nick Fish
Commissioner Amanda Fritz
Commissioner Randy Leonard
Commissioner Dan Saltzman
City Auditor LaVonne Griffin-Valade

From: Capital Improvement Plan (CIP) Task Force

CC: Jack Graham CAO, Richard Goward Jr. CFO, Financial Planning Division staff

Subject: One Year Update on CIP Task Force Recommendations

The CIP Task Force reconvened in October 2012 to assess the recommendations put forth last year and confirm or refine the recommendations based on progress made to date. The task force met twice for the status update (October 10th and October 17th); the following members participated:

Citizen Representatives	Parks	OMF	BES	Financial Planning
Andre Baugh (PBOT BAC)	Scott Rowe	Aaron Beck	Susan Aldrich	Claudio Campuzano
Thomas Badrick (PURB)	Jeff Shaffer		Ellen Larson	Ryan Kinsella
Glenn Bridger (PIAC)			Bill Ryan	Jeremy Patton
Gordon Feighner (PURB)	Water	PBOT		Lisa Shaw
Kevin Spellman (BES BAC)	Jeff Winner	Kathryn Levine		
Julie Vigeland (Parks BAC)		Truc Nguyen		

FY 2011-12 Budget Note: Office of Management and Finance (Capital Budgeting Process) "Council directs the Office of Management and Finance to establish a taskforce to review the citywide Capital Improvement Project (CIP) budget documents and processes. The taskforce will generate recommendations to improve the public transparency and accountability of the CIP documents and process. The taskforce will include members of the Financial Planning Division, Public Utilities Review Board, one representative each from the major infrastructure bureaus' Budget Advisory Committees, the Auditor's Office, one representative from the Public Involvement Advisory Council, and appropriate representatives from the major infrastructure bureaus which include Portland Water Bureau, Bureau of Environmental Services, Portland Bureau of Transportation, Portland Parks and Recreation and Office of Management and Finance. A report is due back to Council by November 1, 2011, so that changes can be incorporated into the FY 12-13 budget process."

In response to the budget note listed above, the task force created a list of six recommendations, which Council approved as part of the FY 2011-12 Fall Budget Monitoring Process. The following is a summary of the recommendations and their status to date.

Recommendations – Status Updates

1. Project threshold. Establish a \$500,000 total project reporting threshold, in order to pull apart large dollar programmatic 'roll-ups.' This threshold criteria directs bureaus to disaggregate program level CIP projects to their smallest level, for example listing three related projects of \$500,000 each instead of listing one larger consolidated project of \$1.5 million.

UPDA TE: The recommendation has been implemented. The results were helpful to the citizen advisors and did not

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create an undue burden on staff. The physical budget document is slightly longer.

2. Consolidated CIP. Create a summary table of the top 10 inter-bureau capital projects, in order to provide citizens with a roadmap for understanding the many inter-related and complex projects in which the infrastructure bureaus frequently engage.

UPDATE: This recommendation has not been implemented yet. It is a priority for Financial Planning to implement the table for the FY 2013-14 Adopted Budget.

3. New Project Designation. Flag the first time a project appears in the CIP. It is often difficult for the general public to track projects from their inception in the CIP. Flagging projects as “new” will assist citizens in understanding how a bureau changes and updates their project list over time. Additionally, this designation may provide guidance on when a citizen or citizen group can influence the scope or location of a future project.

UPDATE: The recommendation has been implemented. The changes were relatively easy to make in the budget document. The task force believes this worked well, however, Financial Planning is encouraged to add an explanatory statement in the document that describes how a project is designated as “new”. FPD will include this information in the FY 2013-14 Adopted Budget.

4. Revenue Source. Consistently identify non-bureau revenue sources by project. The general public does not always understand the mix of resources that bureaus use to fund projects. Some infrastructure bureaus have a significant percentage of external revenue sources that shape the way in which they approach their capital plan: A designation will help citizens understand where the bureau may have more discretion to reprogram funds and where there are limitations tied to external sources. The revenue source will always be listed as the final sentence in the detail project description for each capital project.

UPDATE: The recommendation has been implemented. The change required some upfront labor by bureau staff, but will be easy to maintain. The task force members agreed with this approach.

5. Criteria. Include the primary criteria that elevated the project to the CIP. Citizens often cannot tell why a project was included in a bureau’s CIP when many other projects were not funded. Indicating both the internal criteria used to elevate the project into the plan as well as a descriptive justification will help reeducate the public about a bureau’s decision-making process.

UPDATE: The recommendation has been implemented. Bureaus provided criteria in their Requested Budget submissions and a more consistent criteria narrative during the Adopted Budget.

6. Accountability. The primary components of “accountability” are: a. project status; b. estimated completion date; and c. original versus updated total project costs. Having these three additional pieces available for each project will enable interested citizens to more closely track the progress on individual projects and hold bureaus to a higher level of accountability. The first two pieces of information will be made readily accessible by the public using capital project titles as available via www.portlandmaps.com (PortlandMaps) under “projects” and the original and updated total project cost can be made available through the City’s budgeting software.

UPDATE: Implementation is in progress. A. Bureaus are maintaining accurate data within PortlandMaps, but not on the same timeframe. FPD will coordinate with bureaus to work toward a more consistent approach. B. FPD has started conversations with the Bureau of Technology Services about making the project details more accessible within PortlandMaps and will work toward implementation for the FY 2013-14 Adopted Budget. C. FPD has already updated the budget document to display both the original and updated total project costs. FPD will provide an explanation within the adopted budget document for how the original cost was determined.

Conclusion

The task force thanks the Council for the opportunity to provide input on the status of CIP changes over the past fiscal year and respectfully requests that the Council continue to support the task force recommendations for the FY 2013-14 budget development process and beyond. The task force would like to continue to provide input into the CIP process.



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November 1, 2011

To: Mayor Sam Adams
Commissioner Nick Fish
Commissioner Amanda Fritz
Commissioner Randy Leonard
Commissioner Dan Saltzman
City Auditor LaVonne Griffin-Valade

From: Capital Improvement Plan (CIP) Task Force

CC: Jack Graham CAO, Richard Goward Jr. CFO, Financial Planning Division staff

Subject: CIP Document and Process Recommendations

The CIP Task Force was convened in response to this FY 2011-12 budget note:

Office of Management and Finance (Capital Budgeting Process) Council directs the Office of Management and Finance to establish a taskforce to review the citywide Capital Improvement Project (CIP) budget documents and processes. The taskforce will generate recommendations to improve the public transparency and accountability of the CIP documents and process. The taskforce will include members of the Financial Planning Division, Public Utilities Review Board, one representative each from the major infrastructure bureaus' Budget Advisory Committees, the Auditor's Office, one representative from the Public Involvement Advisory Council, and appropriate representatives from the major infrastructure bureaus which include Portland Water Bureau, Bureau of Environmental Services, Portland Bureau of Transportation, Portland Parks and Recreation and Office of Management and Finance. A report is due back to Council by November 1, 2011, so that changes can be incorporated into the FY 12-13 budget process.

The task force was comprised of the following 24 members:

Citizen Representatives	Auditor	BES	Parks
Andre Baugh (PBOT BAC)	Declined participation	Jaime De La Garza	Sarah Coats Huggins
Glenn Bridger (PIAC)		Ellen Larson	Brett Horner
Mike Crean (PURB)		Bill Ryan	Fred Kowell
Gordon Feighner (PURB)			Scott Rowe
Charles McGee II (Water BAC)			
Kevin Spellman (BES BAC)			
Julie Vigiland (Parks BAC)			

PBOT	Water	OMF	Financial Planning
Kathryn Levine	Jeff Winner	Aaron Beck	Jeremy Patton
Truc Nguyen			Seth Reeser
			Andrew Scott
			Lisa Shaw
			Bob Tomlinson

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The task force met on the following four dates: September 28th, October 5th, October 12th and October 19th.

Overview

The following six short-term recommendations are intended to be implemented as a pilot program for one fiscal year. We suggest that the task force, both citizen and bureau representatives meet again next October to evaluate the changes and provide further guidance and recommendations in order to refine the process. The task force has also included one long-term recommendation for the Council's consideration in future budgets.

For illustration, we have attached several exhibits: *Exhibit A* provides an example of the existing CIP project detail page; *Exhibit B* the first page of the City's Adopted Budget Overview section, *Exhibit C* an example of two bureau's Requested Budget CIP submissions (1. cover page and 2. CIP selection process page).

Short Term Recommendations

There are six recommendations to be implemented during the FY 2012-13 Budget Development Process:

1. Project Threshold
2. Consolidated CIP
3. New Project Designation
4. Revenue Source
5. Project Criteria
6. Accountability / Project Status

1. Project threshold. Establish a \$500,000 total project reporting threshold.

The intent of this item is to pull apart significant programmatic 'roll-ups' that currently exist, so that citizens can see and understand the many significant projects that may be included in single 'project' descriptions. Bureaus that already budget at a lower threshold should maintain their current level of budgeting.

Recommendation: Direct all infrastructure bureaus to officially budget all CIP projects which are \$500,000 or greater individually in the City's budgeting software, but establish an exemption for "ongoing" projects as defined by the bureaus.

This change will impact the bureaus' Requested Budget CIP document and the City's Adopted Budget document.

2. Consolidated CIP. Create a summary table of the top 10 inter-bureau capital projects, in order to provide citizens a roadmap to understanding the many inter-related and complex projects that the infrastructure bureaus frequently engage in. This will help to ensure the public's understanding and provide assurance that bureaus are working collaboratively.

Recommendation: Direct OMF to establish a chart, similar to the one depicted below, that will consolidate the City's top 10 inter-bureau projects into one chart in the Overview section of the City's Adopted Budget. Bureaus will work with FPD to identify appropriate projects for inclusion.

Project Name	Y1	Y2	Y3	Y4	Y 5	Total 5 YR	Total Project Cost
Streetcar	\$1,000,000	\$	\$	\$	\$	\$	\$
PBOT	\$750,000	\$	\$	\$	\$	\$	\$
Water	\$200,000	\$	\$	\$	\$	\$	\$
BES	\$ 50,000	\$	\$	\$	\$	\$	\$

This change will impact the City's Adopted Budget document.

3. New Project Designation. Flag the first time a project appears in the CIP.

It is often difficult for the general public to track projects from their inception in the CIP. By flagging projects as “new” it will assist citizens in understanding how a bureau’s project list is changing and updating over time. Additionally, this designation may provide guidance on when a citizen or citizen group can influence the scope or location of a future project.

Recommendation: Direct OMF to add a field in the City’s budgeting software that can accommodate the text “new” for each capital project and direct the infrastructure bureaus to use the field appropriately. Define a “new” project as one that was not published in the previous year’s Adopted Budget CIP.

This change will impact the bureaus’ Requested Budget CIP document and the City’s Adopted Budget document.

4. Revenue Source. Consistently identify non-bureau revenue sources by project. The general public does not always understand the mix of resources that bureaus use to fund projects. Some infrastructure bureaus have a significant percentage of external revenue sources that end up shaping the way in which they approach their capital plan. A designation will help citizens understand where the bureau may have more discretion to reprogram funds and where there are limitations tied to external sources.

Recommendation: Direct infrastructure bureaus to consistently include language in the last line of the narrative section of the Project Detail page of the CIP (Attachment A) which lists all non-bureau revenue sources included in the project. Define non-bureau as anything separately acquired. For example, bureau sources would include rate revenues, bond proceeds, General Fund allocations, and Gas Tax revenues. All other categories would be included.

This change will impact the bureaus’ Requested Budget CIP document and the City’s Adopted Budget document.

5. Criteria. Include the primary criteria that elevated the project to the CIP. Citizens often cannot tell why a project was included in a bureau’s CIP when many other projects were not funded. Indicating both the internal criteria used to elevate the project into the plan as well as a descriptive justification will help reeducate the public about the bureaus’ decision-making process.

Recommendation: Direct infrastructure bureaus to include a description and list of the internal criteria that they use to evaluate all of the capital projects in their CIP. This description should be included in the “Capital Improvement” section of the Requested Budget (Exhibit C). Additionally, direct infrastructure bureaus to consistently include a “justification” sentence in the text section of the Project Detail page (Exhibit A) – this will be included in the Requested Budget and the Adopted Budget documents.

This change will impact the bureaus’ Requested Budget CIP document and the City’s Adopted Budget document.

6. Accountability. The primary components of “accountability” are: project status; estimated completion date and original versus updated total project costs. Having these three additional pieces available for each project will enable interested citizens to more closely track the progress on individual projects and hold bureaus to a higher level of accountability. The first two pieces of information will be made readily accessible by the public using capital project titles as available via www.portlandmaps.com under “projects” and the original and updated total project cost can be made available through the City’s budgeting software.

Recommendation: Direct infrastructure bureaus to maintain accurate and timely capital project data within

www.portlandmaps.com at least on a quarterly basis. Direct OMF (Financial Planning and BTS) to provide a link that is readily accessible by the general public to gain access to CIP project current status and completion date for all projects listed in the bureaus' Requested Budget submission and for the final Adopted Budget. In terms of providing total project costs, FPD is directed to capture the estimated total project cost the first year that an infrastructure bureau's project has been funded (not an out year plan) as the original project cost. Infrastructure bureaus are directed to provide good faith annual updates during each budget development process.

This change will impact the bureaus' Requested Budget CIP document and the City's Adopted Budget document.

Long Term Recommendations / Issues

To be considered by Council and the infrastructure bureaus for implementation in the future:

- **Consolidated CIP.** The taskforce encourages the City to move toward developing a comprehensive Citywide CIP rather than maintaining separate bureau specific CIPs. We recognize that this will be a difficult and complex goal to attain and support interim efforts to work toward this goal.

Conclusion

The Task Force requests the opportunity to reconvene October 2012 to provide feedback on how the revised process is working from a citizen's point of view. Additionally, we ask that the infrastructure bureaus take note of the impact these changes have on their operations and provide feedback and suggestions on further refinements going forward. We also ask Budget Advisory Committee, Public Involvement Advisory Council and Portland Utility Review Board members to note the impact these changes have on their reviews of the Bureau CIP's and as well as those of general public.

Thank you for the opportunity to provide our input. We respectfully request that the Council adopt the above recommendations for the FY 2012-13 Budget Development process and direct OMF to reconvene the CIP Task Force in one year's time.

Bureau of Environmental Services

Capital Program	Revised		Adopted		Capital Plan			5-Year Total
	Prior Years	FY 2010-11	FY 2011-12	FY 2012-13	FY 2013-14	FY 2014-15	FY 2015-16	
Combined Sewer Overflow								
Balch Consolidation Conduit								
	Dollars for Green:	0						
				Total Project Cost:	74,617,475		Area:	North
				Dollars for Art:	0		Objective(s):	Mandated
Project Description								
Located in NW Portland, this project consists of approximately 7,000 feet of 84-inch diameter pipeline that will convey combined sewage flows intercepted at Industrial & 29th and 29th & 31st to the Westside CSO Tunnel. This project is part of the CSO Program and must be completed by December 1, 2011 to comply with the Amended Stipulation and Final Order (ASFO) administered by DEQ.								
Total Expenditures	1,995,449	29,266,000	3,000,000	0	0	0	0	3,000,000
Net Operations and Maintenance Costs				0	0	0	0	0
Eastside Combined Sewer Overflow System Startup								
	Dollars for Green:	0						
				Total Project Cost:	3,309,854		Area:	East
				Dollars for Art:	0		Objective(s):	Mandated
Project Description								
This project addresses locations where the existing collection system needs to be modified to direct flow into the Eastside CSO tunnel. This project is an element of the Eastside CSO program and is required to be completed and operational by December 1, 2011 as part of the ASFO.								
Total Expenditures	0	851,000	3,002,000	0	0	0	0	3,002,000
Net Operations and Maintenance Costs			10,000	20,000	20,000	20,000	20,000	
Eastside Combined System Overflow Tunnel								
	Dollars for Green:	0						
				Total Project Cost:	537,148,518		Area:	East
				Dollars for Art:	0		Objective(s):	Mandated
Project Description								
This project consists of approximately 31,000 lineal feet of 22-foot internal diameter tunnel. The tunnel extends from the Insley combined sewer basin to the south to the Riverside Basin in the north (Swan Island). The tunnel will collect, convey, and store overflows from 13 combined sewer basins on the east side of the Willamette River. This project is part of the CSO Program and must be completed by December 1, 2011 to comply with the ASFO.								
Total Expenditures	257,395,752	42,100,000	9,970,000	0	0	0	0	9,970,000
Net Operations and Maintenance Costs			0	0	0	0	0	
POFM Odor Control FC								
	Dollars for Green:	0						
				Total Project Cost:	3,265,002		Area:	Citywide
				Dollars for Art:	0		Objective(s):	Mandated
Project Description								
This project will construct an odor treatment facility at Columbia Court south of the entrance to Columbia Boulevard Wastewater Treatment Plant (CBWTP). Project is designed to blend with the landscaping. It also includes minor enhancements to the bike trail. This project is dependent on the completion of Segment 2 of the Portsmouth force main construction project.								
Total Expenditures	0	0	2,800,000	0	0	0	0	2,800,000
Net Operations and Maintenance Costs			0	15,000	15,000	15,000	15,000	

Budget Overview

A Guide to the Budget Overview

The City of Portland (the City) budget document for FY 2011-12 serves as a fiscal, programmatic, and policy information guide. The document is organized to provide Citywide information at levels of increasing detail.

Within the Budget Overview, the City's budget decisions and financial information are presented from a variety of perspectives. There is special emphasis on the General Fund as it contains the discretionary resources available to the City, resources that can be allocated to any City program. In most instances, dollar amounts in the Budget Overview are shown in comparison with the Revised Budget for FY 2010-11. In the following pages, you will find information on:

- ◆ The total City budget
- ◆ The General Fund budget
- ◆ Highlights of budget decisions
- ◆ Highlights of the Capital Improvement Plan
- ◆ A description of the budget process

Summary financial tables are located in the Financial Overview section of this document.

Preparing For Financial Challenges

The General Fund financial forecast for FY 2011-12 shows a City that has weathered the worst national recession in decades and is emerging on a path to a stronger, more resilient economy. Job creation is accelerating, business activity is increasing, and exports shipped out of the Port of Portland have already returned to their pre-recession peak. While unemployment is still high, it is trending downward.

The Mayor and Council started preparing early for the recession. In FY 2009-10, they asked bureaus to propose programmatic reductions of up to 5% in anticipation of declining revenues. In FY 2010-11, they asked public safety bureaus to prepare 2% reductions, and non-public safety bureaus to prepare 4% reductions. For this year's budget, they continued to ask for modest program and administrative savings, and asked bureaus to be creative in terms of realignments and efficiencies that could save money without reducing services. The actions in this budget and over the last two years have kept Portland ahead of the recession, and prepared to move into the future.

Council Vision, Mission, Values, and Goals

Vision

We aspire to be a beautiful, safe, and clean city of choice for ourselves and future generations - a city with a healthy and sustainable economy, strong businesses, vital neighborhoods, a diverse population, excellent schools, a vibrant downtown, an honest government that is open and participatory, extensive recreational and cultural opportunities, a healthy environment, and sufficient housing stock to meet our needs.



FY 2011-2016 Requested Five-Year Capital Improvement Program



Portland Water Bureau
Randy Leonard, Commissioner
David G. Shaff, Administrator

January 31, 2011

Appendix B. CIP Selection Process

Capital Selection Process

Transportation Capital projects are developed and received throughout the year from a variety of sources. Portland Bureau of Transportation receives requests for capital projects from neighborhoods, businesses, and individuals. Projects are developed through neighborhood plans and studies adopted by City Council. In addition, PBOT partners with other public and private organizations to develop new project ideas that share common transportation goals and values. These projects are compiled in the Transportation System Plan (TSP) and are scored and ranked based on TSP criteria in accordance with City Council goals, Metro 2040 growth concept and Transportation's charter. The TSP was reviewed by the Planning Commission in July of 2002 and it was adopted by City Council in October 30, 2002. It went into effect December 14, 2002.

Based on the TSP lists, asset and division managers submit projects to the Capital Oversight Committee (COC) to be included in the CIP. The COC then reviews the submitted project requests list along with the revenue forecast and develops a balanced 5-year CIP. The balanced CIP is then presented to PBOT Directors Team for approval.

In November, the Directors Team finalized the requested CIP list. On January 5, 2010, the Bureau's Budget Advisory Committee approved the 5-year CIP. The requested CIP is then submitted to the Office of Management and Finance via Bureau's Requested Budget. The City receives additional testimony through the City's budget process.

The City will map CIP projects on the Internet at <http://www.PortlandMaps.com> with summary information and contact reference to be viewed from any desktop location. Citizens are able to review the project's status and even e-mail the appropriate project contact person directly from this web site.

Capital Selection Criteria

Projects included in the Transportation CIP have been evaluated and scored in accordance with established criteria. These criteria will ensure that the projects are consistent with City Council goals and objectives and serve the citizens of Portland to the best of our abilities in compliance with the BOT mission. These criteria are:

- Support 2040 Areas - support a compact urban by supporting development of high-priority Region 2040 areas.
- Reduce VMT per capita – does project reduce vehicle mile trip per capita?
- Safety – addressing safety by improving existing deficiencies or hazards for pedestrian crossings, bicycles and vehicles.
- Natural Environment – utilizing good resource management and minimizing the impact to natural environment.
- Access – improving access within the activity centers for all modes of transportation.

Agenda No.
REPORT NO.
Title

Capital Improvement Plan

CIP Task Force one year status update report to Council (Report)

<p align="center">INTRODUCED BY Commissioner/Auditor: Mayor Adams</p>	<p align="right">CLERK USE: DATE FILED <u>NOV 30 2012</u></p>
<p align="center">COMMISSIONER APPROVAL</p> <p>Mayor—Finance and Administration - Adams <i>[Signature]</i></p> <p>Position 1/Utilities - Fritz</p> <p>Position 2/Works - Fish</p> <p>Position 3/Affairs - Saltzman</p> <p>Position 4/Safety - Leonard</p>	<p align="center">LaVonne Griffin-Valade Auditor of the City of Portland</p> <p align="center"><i>[Signature]</i></p> <p>By: _____ Deputy</p>
<p align="center">BUREAU APPROVAL</p> <p>Bureau: OMF/Bureau of Financial Services; CAO: Jack D. Graham <i>[Signature]</i> Bureau Head: Richard F. Goward, Jr. <i>[Signature]</i></p>	<p>ACTION TAKEN:</p> <p align="center">DEC 05 2012 ACCEPTED</p>
<p>Prepared by: Lisa Shaw Date Prepared: November 27, 2012</p>	
<p>Financial Impact & Public Involvement Statement Completed <input checked="" type="checkbox"/> Amends Budget <input type="checkbox"/></p>	
<p>Council Meeting Date December 5, 2012</p>	
<p>City Attorney Approval: required for contract, code, easement, franchise, charter, Comp Plan</p>	

AGENDA
<p>TIME CERTAIN <input type="checkbox"/></p> <p>Start time: _____</p> <p>Total amount of time needed: _____ (for presentation, testimony and discussion)</p>
<p>CONSENT <input type="checkbox"/></p>
<p>REGULAR <input checked="" type="checkbox"/></p> <p>Total amount of time needed: 5 minutes (for presentation, testimony and discussion)</p>

FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:		
		YEAS	NAYS
1. Fritz	1. Fritz	✓	
2. Fish	2. Fish	✓	
3. Saltzman	3. Saltzman	✓	
4. Leonard	4. Leonard	✓	
Adams	Adams	✓	