

TIER 2 BACKGROUND RESEARCH – PHONE INTERVIEWS – EDMONTON AND PORTLAND

	1. Edmonton, Alberta	2. Portland, Oregon
Contact Information:	<p>Mountain time (2 hrs earlier) Brian Steil – Land Drainage Administrator 780-496-5591 Contacted: Sept. 19, 2011</p>	<p>Pacific time (3 hrs earlier) Amber Clayton – City of Portland Bureau of Environmental Services _ 503-823-4356 Contacted: October 3, 2011</p>
1. Credit or Rebate Program Details:	<p>1. Year SW utility was established: - 2003 (credit program also established in 2003)</p> <p>2. Sectors to which credit program applies: - Commercial, industrial, institutional – does not apply to residential sector</p> <p>3. Cost of the program: -need to investigate admin. costs</p> <p>4. Cost of program relative to revenue generated by utility: Revenue = 14 million (2003) now 30 million (2011) Cost of program = needs to investigate</p> <p>5. Time spent on program development: -hired consultants – approx 3 years for developing utility and credit program</p> <p>6. When program was initiated: -in 2003 (same year as utility)</p>	<p>1. Year SW utility was established: 1977 – Utility addressed flood control and property protection</p> <p>2. Sectors to which credit program applies: All sectors – if you pay a stormwater fee, you are eligible</p> <p>3. Cost of the program: Initially high level of staffing needs – 8 temporary limited term positions for Customer Service in Water Bureau, 2 FTE permanent positions developed for stormwater review permitting, 4 technical engineer assistant positions (for field visits), 1 FTE for an accountant = total of 15 FTE’s initially – down to 2 FTE now after 5 years of program</p> <p>4. Cost of program relative to revenue generated by utility: -n/a</p> <p>5. Time spent on program development: -n/a</p> <p>6. When program was initiated: 2006</p>

	<p>7. Number of years the program has been implemented: -8 years</p> <p>8. The initial and ongoing uptake for the program: -not a lot (need to investigate further)</p>	<p>7. Number of years the program has been implemented: 5 years</p> <p>8. The initial and ongoing uptake for the program: -initially expected 100,000 residents to participate – total of 35,000 residents applied so far (approx. 1/3) -expected 14,000 ICI – 1200 ICI applied for credit (approx. 1/14th)</p>
2. Number of Stormwater Accounts	<p>1. Population of municipality: -2009 pop. 782,349</p> <p>2. Number of stormwater accounts: -needs to check</p>	<p>1. Population of municipality: -583,000</p> <p>2. Number of stormwater accounts: -180,000 accounts – with ¾ of accounts being residential</p>
3. Application Process and Administration of the Program	<p>1. Number of full time equivalent positions required to administer program: -2-3 FTE for whole program (utility and for credit program)</p> <p>2. Position names and responsibilities: -Land Drainage Utility Administrator – oversees the program and changes in system, according to policies -Methods Analyst – information verifying -Engineering Technologist *note Methods Analyst and Eng. Technologist positions - 50 to 75% of their time on this work</p> <p>3. Time frame allowance for processing an application: -1 to 2 months</p>	<p>1. Number of full time equivalent positions required to administer program: -2 FTE's now</p> <p>2. Position names and responsibilities: -1 technical -1 billing</p> <p>3. Time frame allowance for processing an application: -n/a -offered a rebate the first year of implementation to get property owners applying for the credit – deadline was set for this June 2007</p>

<p>4. Application Fee</p>	<p>1. Application fee for the non-residential and residential (if applicable)? -\$250 for non-residential (no program for residential)</p> <p>2. Does this fee cover the whole cost of administration of the program? -not sure – perhaps for ½ the cases – some cases are more time consuming</p> <p>3. Are there any other fees – perhaps annual fees or other – to cover for the stormwater credit program? -no</p>	<p>1. Application fee for the non-residential and residential (if applicable)? -none</p> <p>2. Does this fee cover the whole cost of administration of the program? -no</p> <p>3. Are there any other fees – perhaps annual fees or other – to cover for the stormwater credit program? -no -18% rate hike (including staffing in this) for first year of implementation of the credit program</p>
<p>5. Inspection and/or Maintenance Requirements for Qualifying for the Credit(s)</p>	<p>1. Does the applicant require a professional engineer or other professional to sign that the SWM quantity or quality control is as described in the application? -no –process is not separate from their approval process -developers need to submit their plan that must be signed by an engineer (Technologist checks plan) -they don't get plans for retrofits, but they do get plans for renovations (ie. big additions) and new properties</p> <p>2. Is an inspection required to ensure compliance? If so, how often is it conducted, and by whom? -no -5 year agreement</p>	<p>1. Does the applicant require a professional engineer or other professional to sign that the SWM quantity or quality control is as described in the application? -no</p> <p>2. Is an inspection required to ensure compliance? If so, how often is it conducted, and by whom? -residential sector is spot checked only -ICI sector – goal is to inspect every ICI property. Application form was complicated, and found some properties had errors. -Application is now off the web – site visits now happen at same time of registering for the credit (they can indicate initial and O&M needs at the site visit)</p>

	<p>3. What are the credit program maintenance requirements? Do you have this process documented (ie. are there written procedures)? Would you be willing to share this information? -he will see if he can locate the implementation document and provide for us</p>	<p>3. What are the credit program maintenance requirements? Do you have this process documented (ie. are there written procedures)? Would you be willing to share this information? -lots of documentation at the beginning of implementation -documentation was very specific, so not likely to apply to our case</p>
6. Technical Guidance for the Public	<p>1. Does your municipality provide technical guidance for the public in how to apply for a credit? -technical guidance on internet (Q&A)</p> <p>2. How is this technical guidance provided to the public? Via website? Training sessions? Brochures or manuals? Are you willing to share this information? -via website</p>	<p>1. Does your municipality provide technical guidance for the public in how to apply for a credit? -yes</p> <p>2. How is this technical guidance provided to the public? Via website? Training sessions? Brochures or manuals? Are you willing to share this information? -via website -free site visit -free follow up materials/guidance on permitting</p>
7. Education and Training Sessions/Community Outreach	<p>1. How did you communicate this program to the public? Are you willing to share this information? -stakeholder meetings with the public from 2000 - 2003</p> <p>2. Does your municipality provide training sessions? Who is the target audience? -At implementation, information was in the newspaper, and provided with the utility bill (pamphlets)</p>	<p>1. How did you communicate this program to the public? Are you willing to share this information? -variety of ways: -low impact, like bill inserts -on the bill itself – messages on the side -extensive advertising budget – thus ads in local newspapers and neighbourhood newsletters -evening workshops (2 times/ month) were free the first year (both by City and working with local and regional events) -ICI sector had a direct mail out – good response</p>

	<p>3. Does your municipality work with other environmental groups/ organizations to provide the education and training? -done work with the school board (likely during the same timeframe of 2000-2003) -contact info for education is Janis Dewer 780-442-4364</p>	<p>2. Does your municipality provide training sessions? Who is the target audience? -yes – evening workshops for everyone (residents)</p> <p>3. Does your municipality work with other environmental groups/ organizations to provide the education and training? -yes</p>
<p>8. Program Goals, Measurements of Success, and Lessons Learned</p>	<p>1. What was your goal for the program? What targets did you set? -charges fair for each property -want fair and equitable payment of stormwater fees (leaving room for changing the charge per property – case by case basis)</p> <p>2. How did you measure success of the program (what were your key performance indicators)? -not measured in general (or not known)</p> <p>3. Did your municipality run into any financial or legal liabilities in administering this program? -no</p> <p>4. How did your municipality address properties that shared SWM controls with neighbouring properties? -don't generally have this issue -key is that they require to keep the flow on the</p>	<p>1. What was your goal for the program? What targets did you set? -fair and equitable – recognized that 18% rate hike affected some properties significantly – opportunity to provide education – and explain difference between onsite and offsite systems -targets – wanted to encourage stormwater retrofits (people were concerned with ongoing maintenance)</p> <p>2. How did you measure success of the program (what were your key performance indicators)? -no, did not measure success -not just looking at how many people registered in the first year -number of audits performed (site verification) – happy they are close to 100% of ICI sites visited (5 years after program initiated) -providing good service to the rate payers</p> <p>3. Did your municipality run into any financial or legal liabilities in administering this program? -not so much – rate payer signs the registration form</p>

	<p>individual property until it reaches the stormwater system (ie. no cross lot servicing allowed)</p> <p>5. Would you like to share any lessons learned with the development and implementation of the stormwater credit or rebate program?</p> <p>-Problems associated with having the billing tied to the water accounts: -Issue with only getting money from those people who have moved into new condos, not the whole condo development at once -“Flow Through File” – set up for those properties, like parking lots, that don’t have water meters – problem with keeping the information in the file up-to-date and getting revenue (owners of parking lots change frequently – thus lots of manual work for them with properties not tied to water acct.) -possible solution is to have the stormwater accounts tied to the tax system (concerns that auditors could say it’s not fair and equitable) -water accounts close and open up frequently -commercial malls – need to administer fees fairly</p>	<p>agreeing to limited on-site inspections of only stormwater facilities</p> <p>-one property has gone to Risk Management – it was noted that what the rate payer was doing on-site was not safe – stormwater discount was taken away – issue was forwarded to by-law **Good to establish a feedback loop with by-law to deal with these cases</p> <p>4. How did your municipality address properties that shared SWM controls with neighbouring properties? -not very much an issue -one drywell was shared – the rate payers shared the discount (these incidents are addressed case by case)</p> <p>5. Would you like to share any lessons learned with the development and implementation of the stormwater credit or rebate program? -Portland made their ICI form too complicated – problems as a result -showing the fee split (private property and public property) is a good way to show rate payers what portion they can adjust – 35% onsite, -65% is offsite (public system – fixed cost) -Portland determined the 35% and 65% doing inhouse GIS modeling (measuring impervious area on private property, and impervious area in public right-of ways) -1993 – a not very well designed credit program that allowed for 100% of credit to be discounted had to be phased out – but residential sector wanted it back (psychological need to have it)</p>
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