



**OFFICE of EQUITY  
and HUMAN RIGHTS**  
CITY OF PORTLAND

Realizing Equity. Enhancing the City of Portland.

**Commissioner in Charge:**  
Charlie Hales, Mayor

**Bureau Director:**  
Dante J. James, Esq.

### **Budget Equity Assessment Tool**

This Budget Equity Assessment Tool is a general set of questions to guide you and your Budget Advisory Committee in assessing how current budget requests or decisions benefit and/or burden communities, specifically communities of color and people with disabilities. This is a critical part of the City of Portland's commitment to ending inequity based on race and disability.

The use of the Budget Equity Assessment Tool in developing your budget will guide you through answering these questions. It is recommended that all managers and others who work on the budget for the bureau use this tool.

#### **HOW TO USE THIS DOCUMENT**

The document is divided into four specific sections: 1. Advancing Equity Overall; 2. Personnel; 3. Programs/Services; 4. Equitable Public Participation. Each section has a series of questions. The Office of Equity and Human Rights is available for discussion/training/consultation regarding the use of this document.

**BUREAU/OFFICE/DEPARTMENT** Office of Neighborhood Involvement

#### **I. ADVANCING EQUITY**

1. Will this budget proposal reduce, limit or eliminate programs that are vital to or disproportionately needed by communities of color, immigrant and refugee communities and/or people living with a disability?

ONI's Requested Budget does not reduce, limit or eliminate programs.

2. Will this budget proposal increase, expand or create programs that are vital to or disproportionately needed by communities of color, immigrant and refugee communities and/or people living with a disability?

ONI's Requested Budget would at a minimum maintain but also seeks to reinstate and expand programs that are disproportionately needed by communities of color, immigrant and refugee communities and people living with a disability. ONI's mission and goals center around expanding civic engagement and broadening community impact on public decisions, and in particular efforts in recent years have focused on building community capacity and expanding the programs that involve under-engaged communities. The ONI base budget maintains programs that specifically engage these populations such as the Diversity and Civic Leadership (DCL), Elders in Action and Disability programs and maintains funding for other



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programs that have also prioritized these efforts. ONI and its BAC identified the top priorities for increased funding are those that expand civic engagement and leadership development in Portland. The priority add package would increase funding to the DCL Program that would enable more effective and sustained involvement of emerging leaders from communities of color, immigrants and refugees. During prior years of cuts, the DCL program was held harmless whenever possible in order to maintain funding but it has been clear that the program remains vastly under-funded. This budget request would begin to move towards a more equitable budget. Once adequately funded in future years it could allow the opportunity to broaden the communities funded through this program as ONI continues to receive inquiries from other organizations seeking funding for leadership development work in the populations they serve. The top priority package would also re-create the Neighborhood Small Grants Program that provides funding for community driven priorities to build community while seeding and/or sustaining volunteer efforts. The prior years of grants program demonstrate the effectiveness of leveraging funds for significant projects and also document that availability of funding can attract new and diverse membership while creating expanded partnerships. Other priority funding requests include requests to expand emergency preparedness programs for people with limited English proficiency and non-English speakers and funding to support a civics leadership academy to engage and train people with disabilities.

ONI's Budget also seeks to sustain funding for the East Portland Action Plan (EPAP) implementation. East Portland has faced challenges with its significant growth and lack of funding for the infrastructure needs to manage that growth. A priority objective for EPAP has been to involve diverse representation and that has proven successful with the expanded participation experienced in East Portland through the implementation. Almost half of representatives at general meetings are from communities of color, immigrants and refugees and/or people living with a disability and a substantial portion of grant funds have been dedicated to language and culturally specific projects that continue to expand this involvement.

3. What considerations were taken into account in this proposal to maximize equity?

The BAC's Budget Criteria for FY 2015 Budget Development included the following top priorities:

- Ensure a voice to vulnerable populations
- Be informed by a strategic direction
- Achieve high quality customer service and meet community expectations
- Be strategic with what is added/lost
- Reflect our mission, goals and values
- Be equitable
- Build capacity



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These criteria were the foundation for the decisions made by our BAC. In addition, in soliciting proposals for add packages, each submittal was required to provide information to respond to the Budget Equity Assessment tool as well as the Mayor's identified priorities so that those could be considered in evaluating proposals and prioritization of what should be included in the Requested Budget.

**II. PERSONNEL** (SEE, Workforce Demographics per Bureau [here](#) or by visiting our website)

**NOTE:** *It is understood that final demographics resulting from any staff reduction may not be known if there is a bumping process to be completed. However, it is important to monitor the demographics of any layoffs or staff reductions to assess the specific impact to people of color and people with disability (if known). Human Resources can be a resource for this data if it is unknown.*

1. What is the number of staff reductions in this proposed budget?  
There are no staff reductions proposed in the ONI Requested Budget.
2. What is the racial demographic of any staff reductions being proposed?  
There are no staff reductions proposed in the ONI Requested Budget.
3. What is the remaining racial demographic of your bureau after the reductions?  
There are no staff reductions proposed in the ONI Requested Budget. The demographic of ONI currently is 84% White and 16% people of color. ONI is very committed to attracting a diverse candidate pool in our recruitments and continuing to expand our diversity through hiring when possible.
4. What is the position level of any staff reductions being made, e.g., management vs. line staff?  
There are no staff reductions proposed in the ONI Requested Budget.
5. To your knowledge, is there an adverse impact on employees with a disability due to these staff reductions?  
There are no staff reductions proposed in the ONI Requested Budget.

**III. PROGRAM/SERVICES**

1. What service/program outcome or philosophy will be met with the overall budget request?



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ONI's budget seeks to promote a culture of civic engagement, increasing the number and diversity of people involved, building community capacity, increasing impact on public decisions and improving community livability and safety. All of ONI's programs connect to these goals and prioritize any new/increased funding on those efforts that work towards expanding civic engagement and achieving more equitable funding to engage those that have historically been under-engaged by past City efforts.

2. Identify impacts on specific geographic areas.  
 City-wide/Regional     Northeast     Northwest     North  
 Central Northeast     Southeast     Southwest     East  
 Central City
3. Identify the racial demographics of those impacted by this request. (SEE Attached Worksheet)
4. Identify potential impacts on people living with a disability. (SEE Attached Worksheet)

#### IV. CONTRACTING

1. Does the proposed budget impact contracting with outside sources?

ONI's Requested Budget is split between internal expenses and most external funds are awarded through grant agreements with non-profits including the five District Coalitions (plus two city-run Coalition Offices), five Diversity and Civic Leadership partners (Urban League, NAYA, CIO, IRCO, and Latino Network), Elders in Action and Resolutions NW. The only planned direct contracts are through the Graffiti Abatement program. Due to organizational changes with existing contractors, ONI will be putting out a bid for new contracts in the next few months and award new contract(s) in FY 2014-15.

2. What percentage of contracting/consulting work is performed by M/WESB contractors?
  - a. In what capacity (prime contractor, sub-contractor, supplier, etc.)  
To be determined by new contracts.
3. How will this budget impact consulting or contracting with M/W/ESB contractors? (Including professional services)  
To be determined by new contracts. The contracting process will provide an opportunity for M/W/ESB certified firms to be considered for the award.



**V. EQUITABLE PUBLIC PARTICIPATION**

**1. How have you ensured inclusive and equitable participation in the preparation of this budget?**

ONI's budget process is centered on our Bureau Advisory Committee, which we expand during budget season into a Budget Advisory Committee. We openly invite any and all stakeholders and community members to participate in our meetings, and which are open meetings so not limited in membership. We do however establish expectations for participants to engage throughout the process so that they are all working from the same foundational information about our bureau and programs before we reach decision making. ONI's BAC deliberately ends up with very diverse participation and this year included 58 members representing ONI management, staff, labor, neighborhoods and coalitions, diversity and civic leadership partner organizations and participants, other community partner organizations and general community members. This BAC included participation from people and organizations that serve communities of color, immigrants and refugees, and people with disabilities beyond those organizations that currently receive funding from ONI.

The BAC establishes a Steering Committee that includes representation from various programs, this time even including some of those organizations that do not currently receive funding. The BAC develops ground rules for the process and resulting budget to ensure that we focus on the right priorities. The process includes values such as being inclusive, transparent and accessible. Advancing equity is at the center of ONI's values and that is reflected in the BAC priorities as well with top priorities such as "Ensure a voice to vulnerable populations", "Be Equitable" and "Reflect our mission, goals and values". The Steering Committee strategizes in between meetings to ensure that the process for information sharing, proposal development and decision making allows all members to participate by providing different forms of communication from dyads or small groups to large group discussion, caucusing when appropriate and also providing note cards or email opportunities for feedback outside the meetings. We make most of our decisions through full consensus, providing everybody an opportunity to ask questions or challenge an idea until the full group is in agreement and supports the decision being made. The BAC does not just advise ONI on our budget decisions, it actively develops our Requested Budget.

As ONI's mission and goals have focused on expanding the number and diversity of people engaged in public decision making, we encourage and model that in our BAC. We are open to feedback from new participants on what will work best for them to be



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informed about our process and programs and have integrated suggestions into our process by providing an online orientation as well as being open to one on one orientations and mentoring. We have been very excited to see participation evolve over time to include some of the emerging leaders that have been trained through our neighborhood and diversity and civic leadership programs. We have heard positive feedback, including recently after one of our BAC voting processes that one of the members that came to our process through leadership training in the DCL program had shared with a peer how significant they felt their participation was during these meetings. For ONI that is a huge success as our programs attempt to broaden the opportunities and depth of participation. ONI benefits from the expanded diversity and unique perspectives that come to our BAC decision process and ONI is also encouraged by the recognition that individual involvement had an impact on the decisions made by the bureau.

2. How does this budget build community capacity and power in communities most impacted by inequities?

ONI's work focuses on building community capacity, and particularly in expanding the diversity so that the community is more fully represented and have opportunity to impact public decisions. The ONI Budget includes programs that target leadership development and engagement for communities of color, immigrants and refugees and people with disabilities. The budget seeks to maintain and expand capacity to support and organize these communities. Each of these communities are affected by severe inequities in education, health, housing and economic prosperity. Many of the DCL partner constituencies have been impacted by gentrification and moved from areas where they have had historically stronger community relationships, institutions and cultural supports. ONI's budget will help develop new leaders and emerging community groups where there is increasing need for advocacy and civic engagement to improve livability. This budget will support leadership development and engagement that has resulted in transformative engagement and increased power in the City and State over the last five years. It also supports leadership development and advocacy for vulnerable populations including people with disabilities and older adults.

Amalia Alarcón de Morris

BUREAU DIRECTOR (Typed name and signature)



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**Identifying Impacts Worksheet** - Once you have identified the populations/communities impacted, use the following chart to name the potential burdens and benefits.

Populations Impacted	Potential Positive Impacts	Potential Negative Impacts
Communities of Color (Focused on Latino, African American, Native American, Asian and Pacific Islander, and other immigrant and refugee communities)	Leadership development, engagement, advocacy, support, build community capacity, culturally specific services, training, partnership opportunities, grant funding, volunteer opportunities, conflict resolution services, resolution to complaints regarding livability and public safety issues, information and referral to resources.	Programs still under-funded even in full Requested Budget. Funding Equity still a priority in future years.
Portland Residents and businesses	Leadership development, engagement, advocacy, technical assistance and support, build community capacity, training, partnership opportunities, grant funding, volunteer opportunities, conflict resolution services, resolution to complaints regarding livability and public safety issues, information and referral to resources.	Programs still under-funded even in full Requested budget. Funding Equity still a priority in future years, particularly for East Portland.
People with a disability(ies)	Leadership development, engagement, advocacy, technical assistance and support, build community capacity, training, Additional	None



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	Need Registry – outreach and training, partnership opportunities, volunteer opportunities, conflict resolution services, resolution to complaints regarding livability and public safety issues, information and referral to resources.	
Older Adults	Leadership development, engagement, advocacy (personal and broad), technical assistance and support, Additional Need Registry – outreach and training, build community capacity, training, partnership opportunities, grant funding, volunteer opportunities, conflict resolution services, resolution to complaints regarding livability and public safety issues, information and referral to resources.	None
Youth	Leadership development, engagement, advocacy, technical assistance and support, build community capacity, training, partnership opportunities, volunteer opportunities, conflict resolution services, information and referral to resources.	None