



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 or 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 Portland Housing Bureau

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?

No, we are proposing a status quo budget. Requested add packages, if approved, will increase program access for these communities

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?

Yes, requested add packages, if approved, will increase program access for these communities, helping to address housing inequities and increase access to high opportunity neighborhoods.

Additional information is provided below detailing previous years' outcomes related to increasing access and opportunity for communities of color.



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Charlie Hales, Mayor

Bureau Director:
Dante J. James, Esq.

According to the ACS data for 2007-2011 (which is widely acknowledged to have undercounts of communities of color) 42% of people in poverty in Portland are members of communities of color. There are large disparities between each specific community and the white community living in poverty (for example, 35% of the African American community lives in poverty compared to 13% of the white community, and African Americans are twice as likely as the total population to live in poverty).

To meet the need and to begin to try to reduce the racial and ethnic disparities, PHB programs that focus on assisting low income people should reach for serving at least 42% communities of color.

Population Demographics

	Census 2010*	Census 2010 % Population	% of Population in Poverty	% of Community in Poverty**
Black/African American	52,090	7%	12%	35%
Native American	21,533	3%	3%	37%
Latino/Hispanic	80,138	11%	19%	29%
Asian & Pacific Islanders	69,485	9%	8%	18%
White	532,275	72%	58%	13%
Total Communities of Color	223,246	30%	42%	28%
Total Population	737,902			17%

*Please note that these numbers are "alone or in combination with other races" and that this over counts the total population by 2.4% (or 17,619 people).

**In each race, this is the percentage of the community living in poverty (for example, of the 21,533 native Americans living in Multnomah County, 37% are living in poverty).

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

PHB will be guided by a locational policy lens to ensure future investment in affordable housing that reduces gentrification and increases equitable access to housing and prosperous neighborhoods. In addition, the PHB revised Strategic Plan prioritizes strategies and investments focusing on those most in need in our communities, particularly those making 60% or less of the median family income.

The revised Strategic Plan directs PHB, in conjunction with community partners, to increase the supply of affordable homes, prevent housing instability and homelessness, and create and stabilize households with a focus on communities of color. Using indicators based on the disparity between the rates of poverty for whites and communities of color, we will increase access to PHB funded programs and



economic opportunities while working to reduce inequities experienced by communities of color in service and housing outcomes.

II. PERSONNEL

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? **Zero**
2. What is the racial demographic of any staff reductions being proposed?
Not applicable, no staff reductions.
3. What is the remaining racial demographic of your bureau after the reductions?
5.45% Alaskan/Native American
9.09% Asian
14.55% Black/African American
12.73% Hispanic
1.82% Two or more races
56.36% White/Caucasian
4. What is the position level of any staff reductions being made, e.g., management vs. line staff? **Not applicable – no reductions**
5. To your knowledge, is there an adverse impact on employees with a disability due to these staff reductions? **Not applicable**

III. PROGRAM/SERVICES (SEE, Workforce Demographics per Bureau [here](#) or by visiting our website)

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

The FY 2014-15 proposed budget would maintain current spending levels for core PHB programs and services. It would also increase ongoing spending by \$1.7 million to increase services to Portland's homeless populations, particularly women, families, youth and veterans. Other changes include one-time budget allocations for



development of affordable housing in high opportunity areas of Portland and translation services and fair housing services funding to continue moving towards meeting our equity and Title VI goals and priority towards increased investments in communities of color to address the decline of certain services between fiscal year 2011-12 and 2012-13.

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?

FY 14/15 Budget Impacts on PHB Service Contracts

	Strategic Plan Investment Priority #1	Strategic Plan Investment Priority #2	Strategic Plan Investment Priority #3	Strategic Plan Investment Priority #4
FY 14/15 Base Budget	0 new contractors: \$10M new funding: 1 Competitive funding process: Fall NOFA	0 new contractors: \$0M new ongoing funding:	0 new contractors: \$0 new funding	0 new contractors: \$ 0K new funding: 0 Competitive funding process
FY 14/15 with Add Packages	0 new contractors: \$0M new funding: 1 Competitive funding process: Fall NOFA	0 new contractors: \$1. 7 M new ongoing funding:	0 new contractors: \$0 new funding	0 new contractors: \$ 0K new funding: 0 Competitive funding process



2. What percentage of contracting/consulting work is performed by M/WESB contractors?

MWESB Disaggregated Project Data for NOFA 2008-2011

3.

	MWESB	%	MBE	%	WBE	%	ESB	%
2008	\$1,106,125	10%	\$121,243	1%	\$632,092	6%	\$352,790	3%
2009	\$5,653,127	17%	\$2,795,953	8%	\$786,467	2%	\$2,069,707	6%
2010	\$16,173,398	28%	\$10,330,042	18%	\$2,317,217	4%	\$3,526,139	6%
2011	\$2,674,704	20%	\$1,289,428	9%	\$82,150	1%	\$1,303,126	10%

Housing Bureau MWESB Disaggregated Project Data—As of 11/30/13

Construction Contracts	MWESB	%	MBE	%	WBE	%	ESB	%
\$214,494,304	\$46,782,825	22%	\$24,906,235	12%	\$7,227,252	3%	\$14,649,338	7%

- a. In what capacity (prime contractor, sub-contractor, supplier, etc.)

The City tracks only first tier sub-contractor utilization, we don't track/report on lower tier utilization at this time.

4. How will this budget impact consulting or contracting with M/W/ESB contractors? (Including professional services)

Housing developers are required to develop, implement, and report on their efforts to provide minority, women, and emerging small business (MWESB) contracting opportunities and must comply with federal and local low-income workforce utilization goals. In FY 2012-13, bureau partners achieved 35% MWESB participation on preservation projects, 29% MWESB participation on rehabilitation projects and 27% MWESB participation on new construction projects. This is an overall increase in MWESB participation from the prior year by 4% and with new construction projects increasing by 2%. The FY 2012-13 results break out as follows across the three categories:



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- Preservation Projects: 35% MWESB participation (16% minority, 7% women, 12% emerging small business)
 - Rehabilitation Projects: 29% MWESB participation (11% minority, 1% women, 17% emerging small business)
 - New Construction Projects: 27% MWESB participation (9% minority, 4% women, 14% emerging small business)

V. EQUITABLE PUBLIC PARTICIPATION

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



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<i>Public Involvement/Public Engagement Processes FY 10/11 – FY 13/14</i>	Strategic Plan Investment Priority #1	Strategic Plan Investment Priority #2	Strategic Plan Investment Priority #3	Strategic Plan Investment Priority #4
FY 10/11	Con Plan PHAC Analysis of Impediments	Con Plan PHAC CCEH 10 YP Reset Healthy Homes Mayor’s Million process	Con Plan PHAC LTE Big Look	Con Plan PHAC CCEH 10 YP Reset Street Count
FY 11/12	Con Plan PHAC FHAC PHB/OON Equity Agenda	Con Plan PHAC CCEH 10 YP Reset Healthy Homes	Con Plan PHAC LTE Big Look FHAC	Con Plan PHAC CCEH 10 YP Reset
FY 12/13	Consolidated Plan PHAC FHAC PHB/OON Equity Agenda Spring Equity Forum NOFA Briefing on Equity PHGOA: DCL Focus Groups	Consolidated Plan PHAC CCEH 10 YP Reset Healthy Homes Spring Equity Forum	Consolidated Plan PHAC FHAC	Consolidated Plan PHAC CCEH 10 YP Reset
FY 13/14	FHAC PHB/OON Equity Agenda Spring Equity Forum NOFA Briefing on Equity	Consolidated Plan PHAC CCEH 10 YP Reset Healthy Homes Spring Equity Forum	Consolidated Plan PHAC FHAC Home Repair RFP HOLTE Redesign	CCEH

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



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PHB’s focus on affordable housing, access to prosperous neighborhoods and community stabilization are critical necessities for communities in building capacity and developing their voice in their community.

Translation services are essential in serving a Portland in which 1:5 citizens are foreign born.

BUREAU DIRECTOR – Traci Manning, PHB

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
Homeless suffering from Mental Illness	Identify the unmet needs of the homeless population living with mental health and or addiction challenges	
Communities of Color - LEP	Translation, increased participation in housing related issues, ability to advocate for themselves	



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