



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 Portland Development Commission

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.

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?

PDC's proposed Fiscal Year 2014-15 (FY 14-15) budget would sustain the agency's community economic development efforts to deliver programs and services to all Portlanders, with an explicit emphasis on equity considerations, targeting communities of color, low-income individuals, people with limited English proficiency, and lagging commercial districts. PDC continually evaluates the effectiveness of its programs and in this FY 14-15 has submitted a General Fund add package request for additional funding that would provide grants to three community based organizations to focus on economic development activities in Lents Town Center, along Martin Luther King Jr. Blvd., and in the Old Town/Chinatown neighborhood.

3. What considerations were taken into account in this proposal to maximize equity?
PDC's requested General Fund budget would provide funding that furthers City's Neighborhood Economic Development Strategy. The three main objectives of the NED



Strategy are to 1.) Build local Capacity to achieve economic development outcomes, 2.) Drive neighborhood business growth, and 3.) Align and coordinate resources to support neighborhood economic development. Given Portland's key demographic and geographic challenges and areas of opportunity, the NED Strategy focuses on communities of color and priority neighborhoods. A job creation and equity focus guides every action, investment, and program. More specifically, PDC uses a Strategic Alignment and Equity Lens for every financial investment, an Equity Impact Analysis for infrastructure projects, and sets equity goals in direct contracting work (see details in section IV Contracting).

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?
None.
2. What is the racial demographic of any staff reductions being proposed?
NA
3. What is the remaining racial demographic of your bureau after the reductions?
NA, since there were no reductions this FY. That said, 22 percent of PDC employees are people of color.
4. What is the position level of any staff reductions being made, e.g., management vs. line staff?
NA
5. To your knowledge, is there an adverse impact on employees with a disability due to these staff reductions?
NA

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?
Mission. PDC's creates economic growth and opportunity for Portland.



Vision. PDC stimulates job creation, encourages broad economic prosperity, and fosters great places on behalf of the City of Portland.

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?

Yes. PDC's budget assumes contracting with outside sources in a number of areas, all of which are subject to the PDC Equity policy established by the Board of Commissioners in January 2013. These areas include:

- Construction contracts held by PDC for tenant improvements and environmental remediation on PDC-owned properties.
- Projects subject to the PDC Equity Policy that are part of a disposition and/or development agreement, or an interagency agreement.
- Professional services associated with the above construction contracting or directly contracted by PDC.

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

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

PDC's last three-year average is 31.2% M/WESB. In FY 12-13, PDC achieved 29% MWESB and \$11 million out of \$37.5 million. Of that \$11 million, \$5.8 million went to MBEs, \$2.1 million to WBEs, and \$1.2 to MBEs. These figures include prime contracting, subcontracting, professional services and supply.

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



Because most of PDC's outside contracting and consulting is subject to the PDC Equity Policy, this budget will continue to provide for more opportunities for certified firms to continue to participate in PDC-funded projects.

V. EQUITABLE PUBLIC PARTICIPATION

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

PDC has created two budget advisory bodies to participate in the preparation of this budget. The Neighborhood Economic Development Leadership Group Budget Sub-Committee is a 13-member group of stakeholders representing social and technical service providers, employers, geographic-based constituents, and others. The Central City Budget Advisory Committee is a 15-member group consisting of constituents representing higher education partners, the Portland Business Alliance, financial providers, and others. Both groups, which have representatives who served in the as members of PDC Urban Renewal Advisory Committees, met three times prior to PDC's submittal of its proposed FY 14-15 budget and provided letters to City Council and the PDC Board of Commissioners articulating their feedback on PDC's work plans and budget.

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

One of the three tenets of PDC's NED Strategy is to build community capacity and its proposed budget reflects that commitment. The General Fund request would provide PDC with funding in FY 14-15 to advance the following initiatives:

Neighborhood Prosperity Initiative (NPI) and Main Street Network: PDC partners with eight community-based organizations located in North, Northeast and East Portland to drive economic development in priority neighborhoods. Each district focuses on the unique needs of its community with the goal of growing businesses and increasing employment opportunities. Grants from PDC enable the organizations to hire full time staff, make small-scale physical improvements, and increase the visibility of the district. PDC staff provides technical assistance training to districts.

Small and Micro Business Technical Assistance: Continues funding for the Small and Micro Business Development Program which provides business technical assistance and support to businesses owned by people with low incomes, people of color and people with limited English proficiency. Technical assistance and support is delivered through PDC contracts with 8 non-profit groups including: Hispanic Metropolitan Chamber, Microenterprise Services of Oregon, and the Small Business Legal Center. In FY 14-15 providers are anticipated to serve 450 businesses: 75% of businesses in NPI and Main Street areas, and 50% will be owned by people of color.



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Commissioner in Charge:

Charlie Hales, Mayor

Bureau Director:

Dante J. James, Esq.

Workforce Development: PDC collaborates with Worksystems, Inc., also known as WSI, to fund and administer workforce development programs for low-income Portlanders with significant barriers to employment. WSI contracts with eleven non-profit providers including: SE Works, Human Solutions, Mt Hood Community College and POIC which serve approximately 1000 individuals, with up to three years of individualized support and training with an emphasis on career track employment. PDC's \$2 million investment leverages at least \$2 million in investment from WSI. PDC is proactively connecting the workforce development providers with NPI and Main Street Managers with the goal of connecting under and unemployed residents of NPI areas to career track employment opportunities.

Venture Portland: Venture Portland is the City's local partner in building the capacity of Portland's 37 neighborhood business districts. Venture Portland's work focuses on regular training and technical assistance workshops for the districts, administration of a business district grant program, and increasing the visibility of districts through marketing support.

Patrick Quinton, PDC Executive Director

BUREAU DIRECTOR (Typed name and signature)



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
In its General Fund traded sector work, PDC's second Startup PDX Challenge is targeted towards entrepreneurs who are women and people of color.	The Challenge will provide opportunities for women and people of color.	None anticipated.
In its General Fund community economic development work and Neighborhood Prosperity Initiative program, PDC's focus is on East Portland and communities of color.	PDC activities and funding through its technical assistance providers and the NPI districts will provide services and resources to underserved communities and communities of color.	None anticipated.
People living with a disability	In the FY 2014-15 proposed budget, PDC has allocated funding for multiple streetscape infrastructure projects, that when constructed, will improve access and mobility for people living with a disability. These projects include 102nd Avenue (Gateway URA), Killingsworth and Lombard (Interstate URA), and Foster Road (Lents URA).	None anticipated.
Gateway Urban Renewal Area demographic characteristics: 29.9% minority 14.7% living in poverty 9.4% unemployed	Investments and activities in Gateway in FY 2014-15 are focused providing assistance to businesses and infrastructure improvements on the Halsey/Weidler corridor.	None anticipated.
Interstate Corridor Urban Renewal Area demographic characteristics: 35.1% minority 18.5% living in poverty 8.6% unemployed	Investments and activities in Interstate in FY 2014-15 are focused providing assistance to businesses and infrastructure improvements on the Killingsworth and Lombard corridors.	Given the gentrification-risk profile of the areas, an equity impact analysis will be performed and carefully considered when making infrastructure investments or other sizable investments.



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Lents Urban Renewal Area demographic characteristics: 34.9% minority 21.1% living in poverty 11.4% unemployed	Investments and activities in Lents in FY 2014-15 are focused providing assistance to businesses and infrastructure improvements on the Foster Road corridor.	None anticipated.
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