



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 Water 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?

Answer: The Water Bureau FY 2014-15 Requested Budget does not 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.

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?

Answer: The Requested Budget does not increase, expand or create programs that are vital to or disproportionately needed by communities of color, immigrant and refugee communities and/or people with a disability.

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

Answer: The Water Bureau did not specifically assess nor based decisions using the “maximize equity” perspective. The Water Bureau has an Employee Investment Water Program. The Program captures the hours allocated to all employees for: required trainings and certifications to operate a water system as well as training to maintain licenses and certificates and City mandated trainings. The Program includes Apprenticeship & Safety Programs; Affirmative Action & EEO Programs, including supporting equity in hiring and other HR practices; and organizational development efforts designed to maximize employee efficiency and effectiveness.

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?

Answer: The FY 2014-15 Requested Budget proposes to eliminate 11 positions. Of the 11 positions, seven positions are vacant and four are currently filled.

2. What is the racial demographic of any staff reductions being proposed?

Answer: The four filled positions proposed to be eliminated are currently staffed by three white males and one female.

3. What is the remaining racial demographic of your bureau after the reductions?

Answer: Based on the Water Bureau EEO counts below are the stats of employees as of 12/31/13.

WB EEO counts	Male	Female	Total
As of 12/31/13	367	176	543
After Proposed Reductions	364	175	539



WB EEO counts	White	Black	Asian	Hispanic	Native American	Two or More	Pacific Islander	Total
As of 12/31/13	444	31	30	14	12	11	1	543
After Proposed Reductions	440	31	30	14	12	11	1	539

4. What is the position level of any staff reductions being made, e.g., management vs. line staff?

Answer: Of the 11 positions proposed to be eliminated in the FY 2014-15 Requested Budget, three positions are management positions and eight are line staff.

5. To your knowledge, is there an adverse impact on employees with a disability due to these staff reductions?

Answer: The Bureau does not know if there will be impacts to employees with disability.

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?

Answer: The Requested Budget will provide sufficient funding to operating and maintain the water system, provide water service to ratepayers at affordable rate and implement the capital program.

2. Identify impacts on specific geographic areas.

- City-wide/Regional Northeast Northwest North
 Central Northeast Southeast Southwest East
 Central City

Answer: All services provided by the Water Bureau have equal impacts to all geographic areas. Services impacting specific communities due to main breaks are responded to on an as needed bases and are on a reactive basis. Therefore, impacts to



racial demographics are generally not a factor in the decision making to restore services.

3. Identify the racial demographics of those impacted by this request. (SEE Attached Worksheet)

Answer: All services provided by the Water Bureau have equal impacts to all racial demographics.

4. Identify potential impacts on people living with a disability. (SEE Attached Worksheet)

Answer: All services provided by the Water Bureau have equal impacts to people living with and without a disability.

IV. CONTRACTING

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

Answer: The Requested Budget, includes \$2,694,378 for Professional Services (Account 521000) compared to \$2,429,045 the FY 2013-14 Adopted Budget.

2. What percentage of contracting/consulting work is performed by M/WESB contractors?
 - a. In what capacity (prime contractor, sub-contractor, supplier, etc.)

Answer:

- City's Aspirational Goal for Awarding Construction Contracts Subcontracts on each project estimated at \$200,000 and above to MBE & WBE Businesses was 35% of Dollar Value Awarded.
- The City maintains an aspirational goal of 20 percent Emerging Small Business (ESB) participation on professional services (PTE) contracts. FY 2012-13 report reflected: M/W/ESB dollars awarded was \$2,085,079.00 (40.52% of the combined Subcontractor and Prime Contractor M/W/ESB's Awarded).



Prime Contractor Utilization FY 2012-13

Certification	Number of Contracts	% of Total	Value of Contracts	% of total
MWESB	13	16.88%	\$863,042	0.70%
NON_MWESB	64	83.12%	\$122,856,946	99.30%

Subcontractor Utilization FY 2012-13

Certification	Number of Contracts	% OF TOTAL	Value of Contracts	% of total
MWESB	53	48.18%	\$10,164,285	16.89%
NON_MWESB	57	51.82%	\$50,001,846	83.11%

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

Answer: The award amount varies from year to year depending on the bureau's capital program. The type of work needed for projects will drive the type of skills needed to complete the required tasks.

V. EQUITABLE PUBLIC PARTICIPATION

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

Answer: The Water Bureau recruited Budget Advisory Committee members from various forum. Below is a list of the BAC members and their affiliations.

- Kellie Barnes, Community Member/ Portland
- Glenn Bridger, Community Member/ SW Portland
- Kay Durtschi, Community Member, Past President SWNI, Multnomah NA
- Michael Ellis, Community Member/SE Portland
- Mark Gipson, Water Bureau, AFSCME Local 189 Representative
- Lise Glancy, Community Member, Port of Portland



**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.

- Charles A. McGee, II, Community Member/ NE Portland
- Ashley Schaer, Non Represented Staff Representative
- Jamie Wilde, COPPEA Representative

Portland Utility Review Board (PURB) Water Sub-Committee Members:

- Thomas Bradrick
- Catherine Howells, At Large Member

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

Answer: Not applicable - all services provided by the Water Bureau have equal impacts to all communities.

David Shaff, Water Bureau Administrator

BUREAU DIRECTOR (Typed name and signature)

Note: The Water Bureau completed this Budget Equity Assessment Tool and has not routed to the BAC for their review and input.



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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
Not applicable to the water bureau		