
Budget Equity Assessment Tool

CITY POLICY

This Budget Equity Assessment Tool is a general set of questions to guide city bureaus and their Budget Advisory Committees in assessing how budget requests benefit and/or burden communities, specifically communities of color and people with disabilities. As noted in Portland's 25-year strategic plan, the Portland Plan, Goal-Based Budgeting, and page 102:

When fully implemented, the new budget approach will direct City of Portland bureaus and offices to:

- Use an asset management approach to achieve more equitable service levels across communities and geographies.
- Track and report on service levels and investments by community and geography, including expanding the budget mapping process
- Assess the equity and social impacts of budget requests to ensure programs, projects and other investments to help reduce disparities and promote service level equity, improve participation and support leadership development.
- Identify whether budget requests advance equity, represent a strategic change to improve efficiency and service levels and/or are needed to provide for basic public welfare, health and/or meet all applicable national and state regulatory standards.

This is a critical part of the City of Portland's commitment to ending inequity. The mission and charge of the Office of Equity is to focus on ending inequality based on race and disability, and this document addresses these two specific populations.

However, it is the policy of the City of Portland that no person shall be denied the benefits of, or be subjected to, discrimination in any City program, service, or activity on the grounds of race, color, national origin, English proficiency, sex, age, disability, religion, sexual orientation, gender identity, or source of income. Additionally, the City's Civil Rights Title VI program guidelines obligate public entities to develop systems and procedures that guard against or proactively prevent discrimination, while simultaneously ensuring equitable impacts on all persons. Therefore, City bureaus are encouraged to use this document to assist in evaluating equitable impacts on all residents.

It is recommended that all managers and others who work on the budget for the bureau use this tool. Bureau Equity Committees may also be a resource in its completion. The Office of Equity and Human Rights is also available for discussion/training/consultation regarding the use of this document.

BUREAU/OFFICE/DEPARTMENT

SECTION ONE: ADVANCING EQUITY

1. How does this budget request increase, reduce, limit or eliminate programs or services that are vital to communities of color, immigrant and refugee communities and/or people living with a disability?
2. What considerations were taken into account in this request to maximize equity?

SECTION TWO: PERSONNEL

See Workforce Demographics by Bureau [here](#) or by visiting our website at www.portlandoregon.gov/oehr

(It is understood that final demographics resulting from any staff reduction or increase may not be known at the time of the budget request. 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 disabilities, if known. Human Resources can be a resource to bureaus.)

3. What is the impact on employees of color?
4. What is the impact on employees with a disability?

SECTION THREE: PROGRAMS/SERVICES

If your bureau or office has multiple programs, please address the budget request for each program or groups of programs.

5. How does this program or service align with the goal of advancing equity?
6. Identify the impacts of the budget request on specific geographic areas:
(Citywide/Regional; Northeast; Northwest; North; Central; Northeast; Southeast; Southwest; East; Central City; or Unknown)
7. What areas of the city will be impacted by your program or service and is there a larger than average population of people of color in those areas?

To help you answer this question, the following map link shows where communities of color are greater than average for the city of Portland.

<https://www.portlandoregon.gov/bps/article/508117>

This next link provides information on overall vulnerability, including maps of communities of color, lower income households, renters, and level of educational attainment. Together these four components are indicators of at risk populations.

<http://www.portlandoregon.gov/bps/66107>

8. Identify potential impacts on people living with a disability. (See Attached Worksheet)



Section Four: EQUITABLE PUBLIC PARTICIPATION

9. How does this budget build community capacity and power in communities most impacted by inequities? (e.g., improved leadership opportunities within BAC, community meetings, stakeholder groups, increased outreach, etc.)

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

Name of Bureau Director

Date

Rev: October 2014