



**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.

MEMORANDUM

To: City Commissioners
Bureau Directors
City and bureau budget personnel

From: Dante J. James

Re: Budget Equity Tool Guidance

Date: November 17, 2015

This will be the third year implementing the tool, and last year's feedback and revision by directors aided in increasing the depth and application of its use. There has been a request for some greater guidance and information about the use of the Budget Equity Tool. The following responses offer thoughts on the most asked questions.

I. What community/communities should be considered?

The Tool focuses on communities of color and people living with a disability. Obviously, the bureaus have a broader constituency and the Tool is not designed to minimize a bureaus consideration of everyone it serves, including other vulnerable populations. However, the Tool's focus should remain with an awareness and review of impacts to people of color and people living with a disability.

II. Timing

Many bureaus will begin the budgeting process within the next several months. Engaging with the Tool as early as possible will allow for its best use and completion prior to decisions being made. Some bureaus have engaged their Bureau or Budget Advisory Committees in using the Tool with discussions of their budgets. Others have not. I would encourage providing the Tool to the BACs and engaging them in the discussion of the questions. OEHR is always available to provide support with this discussion or introduction of the Tool.

III. What fund requests should be included?

There have been questions about whether the Tool is asking about requests for new money or ongoing funding and its allocation/reallocation. There will be two specific sections regarding budget: one for base budgets and one for decision packages. The base budget question asks for an overall view of equity considerations, while the decision package question asks for specific equity considerations of requests, realignments, or reallocations.



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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.

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 may find this tool helpful when evaluating equitable impacts on all residents.

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: BASE BUDGET

What considerations were taken into account in this request to maximize equity?

SECTION TWO: DECISION PACKAGES

If your bureau or office has multiple decision packages, please address each one separately.

1. How does this program or service align with the goal of advancing equity?
 - a. Identify all Citywide Goals and or Strategies you are using:
 - i. <http://www.portlandoregon.gov/oehr/article/537589>
2. 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?
 - i. 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.
 - ii. <http://www.portlandoregon.gov/bps/66107>
3. Identify potential impacts on people living with a disability. (See Attached Worksheet)
4. Identify impacts on workforce demographics. (Goal #1)

Section THREE: EQUITABLE ENGAGEMENT AND ACCESS (Goal #2)

How does this budget build the bureaus capacity to engage with and include communities most impacted by inequities? (e.g., improved leadership opportunities, advisory committees, commissions, targeted 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