



**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.

To: City Council

From: Dante James 

RE: Office of Equity & Human Rights Fall BMP Submittal

Date: Monday, September 30, 2013

The Office of Equity & Human Rights is pleased to submit its Fall Budget Monitoring Process (BMP) report. The following represent the key highlights.

- **General Fund Encumbrance Carryover Request** – OEHR is requesting Council approval to carry over \$32,671 unspent appropriation from FY 2012/13 associated with three encumbered contracts. These contracts are for bureau-wide communications strategy development; institutional racism training for the Citywide Equity Committee; and strategic planning facilitation for the New Portlanders Program.
- **Governing For Racial Equity BMP Request** – OEHR is part of a network of governments (including the City of Seattle, City of Eugene, King County, Multnomah County and the City of San Francisco) collaborating to sponsor a regional equity conference. This decision package will serve both to allocate \$20,000 of general fund one-time committed by Mayor Hales (from the Mayor's existing budget) and to appropriate \$20,000 committed by Multnomah County.
- **General Fund Year-End Balance** – OEHR left \$98,114 of general fund resources unspent at fiscal year-end. Netting out the portion OEHR is requesting for carryover (see above), OEHR contributed \$65,443 to the general fund year-end balance. This was in large part in response to the Mayor's direction to minimize discretionary spending at the end of FY 2012/13.
- **Status Reporting** – The Fall BMP requires OEHR complete two status reporting exercises. The first explains variances between the FY 2012/13 budget and actual expenditures and revenues. The second requirement is for FY 2012/13 year-end budgetary performance measure reporting.

Should you have any questions about the OEHR BMP submittal, please contact Dante James at 823-4433.

# BUDGET AMENDMENT REQUEST

Office of Equity & Human Rights

PERIOD Fall BMP

FISCAL YEAR FY 2013-14

## OE\_001 - Encumbrance Carryover

OEHR is requesting Council approval to carry over \$32,671 unspent appropriation from FY 2012/13 associated with three encumbered contracts. These contracts are for bureau-wide branding strategy development; institutional racism training for the Citywide Equity Committee; and strategic planning facilitation for the New Portlanders Program.

Dollar Amount: \$32,671  
Type: Encumbrance Carryover Request  
Resources: General Fund Discretionary

## OE\_002 - New Revenues

OEHR is requesting Council approval to appropriate \$525 associated with a refund received by OEHR for returned office supplies.

Dollar Amount: \$525  
Type: New Request  
Resources: New Revenues

## OE\_003 - Technical Adjustments

OEHR is requesting Council approval for a series of technical adjustments to the bureau's budget. These adjustments represent no net financial at the bureau-level.

Dollar Amount: \$0  
Type: Technical Adjustment  
Resources: Internal Transfer

## OE\_004 - Governing For Racial Equity

OEHR is part of a network of governments (including the City of Seattle, City of Eugene, King County, Multnomah County and the City of San Francisco) collaborating to sponsor a regional equity conference. OEHR is requesting Council approval to allocate \$20,000 of general fund one-time committed by Mayor Hales (from the Mayor's existing budget) and to appropriate \$20,000 committed by Multnomah County.

Dollar Amount: \$40,000  
Type: New Request  
Resources: Internal Transfer

## Office of Equity Human Rights - FY 2013-14 Fall BMP

### General Fund Encumbrance Carryover Request

Vendor Name <i>Service Detail</i>	Purchase Order	Encumbrance Carried Forward	Amounts Accrued Back To Prior Year	Net Available To Request	Requested Amount
<b>CROSSROADS ANTIRACISM ORGANIZING</b> <i>Citywide Equity Committee Training</i>	22125078	9,800	-	9,800	<b>9,800</b>
<b>MARIA AIMEE SANTOS</b> <i>New Portlander Strategic Planning</i>	22124426	7,500	-	7,500	<b>7,500</b>
<b>METROPOLITAN GROUP</b> <i>Communications Plan PTE Contract</i>	22123626	20,005	4,635	15,371	<b>15,371</b>
<b>Total</b>		<b>37,305</b>	<b>4,635</b>	<b>32,671</b>	<b>32,671</b>

**Prior Year Business Area Reconciliation Report  
General Fund**

	FY 2012-13 Revised Budget	FY 2012-13 Year-End Actuals	Percent of Actuals to Revised
<b>Office of Equity &amp; Human Rights</b>			
<b>EXPENDITURES</b>			
Personnel Services	\$960,578	\$921,868	96%
External Materials and Services	\$158,633	\$104,154	66%
Internal Materials and Services	\$126,396	\$123,419	98%
<b>TOTAL EXPENDITURES</b>	<b>\$1,245,607</b>	<b>\$1,149,442</b>	<b>92%</b>
<b>REVENUES</b>			
Miscellaneous	\$0	\$1,949	0%
General Fund Discretionary	\$1,245,607	\$0	0%
<b>TOTAL REVENUES</b>	<b>\$1,245,607</b>	<b>\$1,949</b>	<b>0%</b>

**Bureau Reconciliation Narrative**

The Office of Equity & Human Rights underspent its External M&S appropriation in FY 2012/13 by \$54,479. \$32,671 is associated with encumbered contracts for which the bureau is requesting general fund carryover in the Fall BMP. OEHR also followed the Mayor's direction to minimize discretionary spending at the end of FY 2012/13. This can be seen particularly in the area of training and out-of-town travel, where OEHR spent only 25% of a \$30,000 appropriation.

## Office of Equity & Human Rights – FY 2013/14 Fall BMP Prior Year Performance Measure Report

With the adoption of the FY 2013/14, the Office of Equity & Human Rights has established a set of performance measures it is tracking and using to evaluate program performance. OEHR does not, however, have performance measure data to report for FY 2012/13 for two reasons.

First, with the creation of the Office of Equity & Human Rights, the operations of the Office of Human Relations were partly discontinued and partly merged into the OEHR. Thus, previous performance measures largely did not apply to the new bureau operations. Second, FY 2013/14 represents the first full year during which OEHR has had a defined programmatic structure reflected in the Adopted Budget.

For reference, the performance measures and targets established by the bureau for FY 2013/14 are listed below.

<b>Performance Measure</b>	<b>Type</b>	<b>FY 2013-14 Performance With Dec Pkg</b>
OE_0001 - Number of HRC meetings held, including subcommittee meetings	WORKLOAD	12
OE_0002 - Number of activities sponsored or held by HRC, including subcommittees	EFFECTIVE	8
OE_0003 - Number of PCOD meetings held, including subcommittee meetings	WORKLOAD	12
OE_0004 - Number of activities held or sponsored by PCOD, including subcommittees	EFFECTIVE	8
OE_0005 - Number of New Portlanders Program Advisory Council meetings held	WORKLOAD	12
OE_0006 - Number of activities held/sponsored by New Portlanders Program Advisory Council	EFFECTIVE	8
OE_0007 - Number of participants/attendees to New Portlanders Program Advisory Council sponsored activities	EFFECTIVE	200
OE_0008 - Number of bureau equity plans reviewed annually	EFFECTIVE	6
OE_0009 - Number of equity-focused trainings CEC members attended	EFFECTIVE	4
OE_0010 - Number of Citywide equity trainings offered by OEHR or BHR	EFFECTIVE	6
OE_0011 - Number of bureau-specific equity-focused trainings provided	WORKLOAD	10
OE_0012 - Number of City employees who received equity trainings annually	EFFECTIVE	650
OE_0013 - Number of bureaus provided with tech support and consulting services	EFFECTIVE	8