



**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 Submission

Date: Monday, September 28, 2015

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

BUDGET ADJUSTMENT REQUESTS

- **General Fund Encumbrance Carryover** – OEHR is requesting \$43,366 general fund one-time to-back encumbrances carried into FY 2015-16. This includes \$31,058 associated with the \$100,000 one-time Translation Pool as well as \$9,391 for the ADA Transition Plan PTE contract
- **ADA 25th Anniversary** – OEHR is requesting Council approve a \$4,300 increase in budget associated with sponsor support. These funds helped offset the costs of the 25th Anniversary Celebration of the Americans with Disabilities Act held in July.
- **Interagency Adjustments** – OEHR is requesting two adjustments to the bureau's budget for interagency services. One is the addition of an interagency with the mayor's office to pass through \$5,823 indirect costs associated COCL (Compliance Officer-Community Liaison) program support position housed at OEHR. The second increases the bureau's interagency with PHB for sub-lease expense by \$2,496 to account for staffing changes over the past year.

STATUS REPORTING REQUIREMENTS

- **Prior Year Decision Package Status Updates:** This report provides updates on decision packages from the FY 2014-15 Adopted Budget and subsequent FY 2014-15 BMP processes. The following are of particular note:
 - **Translation Pool:** Of this \$100,000 one-time pool, \$67,000 was either spent or encumbered by June 30th. Of the remainder, \$27,000 was awarded to bureaus that did not ultimately spend or encumber the funds by June 30th.
- **Prior Year Performance Measures:** OEHR has revised its array of performance measures for FY 2015-16. The attached report provides a baseline of FY 2014-15 year-end status and indicates goals established for FY 2015-16.



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- **Prior Year Budget to Actuals Reporting:** OEHR remained within its budget at the bureau-level as well as within major object expenditure categories. OEHR underspent its allocation by \$91,845 (5%) for the following reasons:
 - \$43,366 was encumbered but unspent by June 30th. OEHR is requesting these funds as carryover.
 - \$27,000 was Translation Pool funding awarded to bureaus, but ultimately not spent or encumbered by those bureaus.
 - \$13,000 was unspent program allocation for the Human Rights Commission

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

**CBO Discussion and Recommendations
FY 2015-16 Fall Supplemental Budget**

Bureau: Office of Equity & Human Rights

Type: Program Carryover Request

Request: OE_001 - General Fund Encumbrance Carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
External Materials and Services	43,366	0	43,366
Internal Materials and Services	0	0	0
TOTAL EXPENDITURES	43,366	0	43,366
REVENUES			
Charges for Services	0	0	0
Interagency Revenue	0	0	0
General Fund Discretionary	43,366	0	43,366
TOTAL REVENUES	43,366	0	43,366

Bureau Description:

OEHR is requesting \$43,366 general fund one-time to back encumbrances carried into FY 2015-16. This includes \$31,058 associated with the \$100,000 one-time Translation Pool as well as \$9,391 for the ADA Transition Plan PTE contract

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2015-16 Fall Supplemental Budget**

Bureau: Office of Equity & Human Rights

Type: New Request

Request: OE_002 - ADA 25th Anniversary

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	4,300	0	4,300
Internal Materials and Services	0	0	0
TOTAL EXPENDITURES	4,300	0	4,300
REVENUES			
Charges for Services	4,300	0	4,300
Interagency Revenue	0	0	0
TOTAL REVENUES	4,300	0	4,300

Bureau Description:

OEHR is requesting Council approve a \$4,300 increase in budget associated with sponsor support. These funds helped offset the costs of the 25th Anniversary Celebration of the Americans with Disabilities Act held in July.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2015-16 Fall Supplemental Budget**

Bureau: Office of Equity & Human Rights

Type: New Request

Request: OE_003 - Interagency Services

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	3,327	0	3,327
Internal Materials and Services	2,496	0	2,496
TOTAL EXPENDITURES	5,823	0	5,823
REVENUES			
Charges for Services	0	0	0
Interagency Revenue	5,823	0	5,823
TOTAL REVENUES	5,823	0	5,823

Bureau Description:

OEHR is requesting two adjustments to the bureau's budget for interagency services. The first adds an interagency with the mayor's office to pass through \$5,823 indirect costs associated COCL (Compliance Officer-Community Liaison) program support position housed at OEHR. The second increases the bureau's interagency with PHB for sub-lease expense by \$2,496 to account for staffing changes over the past year.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2015-16 Fall Supplemental Budget**

Bureau: Office of Equity & Human Rights

Type: Technical Adjustment

Request: OE_004 - Technical Adjustments

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
Internal Materials and Services	0	0	0
TOTAL EXPENDITURES	0	0	0

Bureau Description:

OEHR is requesting Council approval for a number of budget adjustments that represent no net change to the bureau budget.

CBO Discussion and Recommendation

Office of Equity Human Rights - FY 2015-16 Fall BMP
General Fund Encumbrance Carryover Request

	Encumbrance on 7/1/15	BMP Request
8OE0E0000011	\$563	
JOYE LLC	\$563	
22167957	\$563	\$563
Translation services OEHR	\$563	
8OE0E0000013	\$2,791	
MINDLINK RESOURCES LLC	\$2,791	
22169314	\$2,791	\$2,791
Civil Rights Program Title VI	\$2,791	
8OE0E0000018	\$37,236	
COMMUNITY ALLIANCE OF TENANTS	\$21,770	
22152707	\$17,000	\$11,824
FY14-15 Pilot Project GF Amd2	\$17,000	
22167665	\$1,000	\$1,000
carryover for fiscal year 2015-16	\$1,000	
22167666	\$3,770	\$0
translation cost 2014-15	\$3,770	
IRCO	\$883	
22169650	\$883	\$883
TranslationServices-ComGardens,FY2016	\$883	
JOYE LLC	\$563	
22167957	\$563	\$563
Translation services matching grant	\$563	
LAMAR OBIE CORPORATION	\$4,350	
20005528	\$4,350	\$4,350
TRIMET ADVERTISING FOR IPR	\$4,350	
MID-COUNTY MEMO PUBLISHING INC	\$3	
22164127	\$3	\$0
Full Page Ad Corridor Safety Program	\$3	
MINDLINK RESOURCES LLC	\$2,791	
22169314	\$2,791	\$2,791
Title VI Translation Pool	\$2,791	
TRANSLATION SOLUTIONS CORPORATION	\$6,877	
22168471	\$6,877	\$6,877
Translation svcs handouts-brochures	\$6,877	
8OE0E0000019	\$9,391	
MOORE IACOFANO GOLTSMAN INC	\$9,391	
22155950	\$9,391	\$9,391
FY14-15 Moore Iacofano OEHR	\$9,391	
(blank)	\$2,425	
ALLISON RAY	\$92	
22153682	\$92	\$0
Sign Language Interpretation 800	\$92	

Office of Equity Human Rights - FY 2015-16 Fall BMP
General Fund Encumbrance Carryover Request

ANN CURRY-STEVENS	\$2,333	
20005376	\$2,333	\$2,333
Equity Roadmap & Bureau Implementation	\$2,333	
Grand Total	\$52,406	\$43,366

Office of Equity & Human Rights – FY 2015/16 Fall BMP Prior Year Decision Package Status Update

ADOPTED BUDGET DECISION PACKAGES

The FY 2014/15 Adopted Budget included five decision packages. As required in the Fall Budget Monitoring Process, OEHR is submitting status updates regarding these five packages.

1. OE_04 – Title II / Title VI Civil Rights Program Transfer

Add Package: \$208,581 ongoing and \$133,121 one-time general fund resources

The City's Title II and Title VI civil rights programs transferred to OEHR effective July 1, 2014. The resources transferred support ongoing activities (i.e., the program manager and ongoing materials & services budget) as well as one-time funded ones (i.e., a limited term program coordinator for the ADA transition plan and budget to support outstanding obligations on a professional services contract associated with the ADA transition plan). During this fiscal year, the civil rights program has continued to report, monitor and lead title II and title VI compliance activities in the City while the bureau has worked to integrate these activities with the other programs in the bureau.

2. OE_06 – ADA Transition Plan Transfer

Add Package: \$98,723 one-time general fund resources

This decision package transferred the \$98,723 transition plan fund to OEHR along with the City's Title II and Title VI civil rights programs. This fund existed to support the monitoring, reporting and technical assistance activities associated with the City's ADA transition plan. The ADA transition plan will take many years to implement, but the transition plan coordinator is funded only through FY 2014/15. In the FY 2014/15 Spring BMP, Council approved the carry-over of these resources to FY 2015/16 to support a one-year extension of this limited-term position. During the current fiscal year, this program coordinator continues to support the implementation of the ADA transition plan across the City.

3. OE_02 – Pilot Culturally-Specific Mentorship Program

Bureau Realignment Package: \$10,000 general fund resources

These resources were pooled via realignment of existing OEHR budget in FY 2014/15 budget to support a pilot program intended to create a culturally-specific mentorship program, conceived as a replicable model that will help to address disparities in the demographics of the City's management workforce. The need to coordinate among three affinity groups -- Women's, African American and Latino -- resulted in a longer-than-anticipated timeline for development of the program. Thus, in the FY 2014/15 Spring BMP Council approved the

Office of Equity & Human Rights – FY 2015/16 Fall BMP Prior Year Decision Package Status Update

carry-over of these resources to FY 2015/16. OEHR anticipates the “kick-off” for the mentor program to take place in November 2015, with the program running for approximately nine months.

- There will be 10-15 employees in the pilot program
- Mentees will meet with their mentors a specific number of times
- Mentees will complete a personal strategic plan
- Mentees will complete a 360 Degree review

4. OE_03 – Enhance Translation & Interpretation Services

Bureau Realignment Package: \$10,000 general fund resources

This decision package realigned existing OEHR resources in the FY 2014/15 budget to support additional translation and interpretation services in OEHR programs and functions. With this additional resource, OEHR spent a total of \$16,192 for these services in FY 2014/15 as compared to \$9400 during FY 2013/14.

5. OE_05 – OMF IA – ADA Transfer

Reduction Package: \$337 general fund resources

This minor adjustment related to Office of Management and Finance central service rates was absorbed by OEHR within the bureau’s administration budget.

BUDGET MONITORING PROCESS DECISION PACKAGES

The City Budget Office has also requested OEHR provide updates on several decision packages from the Budget Monitoring Processes during FY 2014/15.

1. OE_001 & OE_015 – Translation Funding Pool

During FY 2014-15, OEHR allocated \$50,000 one-time resources from the transfer of the Civil Rights Program to create a translation & interpretation pool. During the Fall BMP that year, City Council allocated an additional \$50,000. As of the end of FY 2014-15, the disposition of these funds is as follows:

- \$2,000 was carried forward in the Spring BMP for a specific approved PP&R activity
- \$33,976 was spent by bureaus prior to 6/30/2015
- \$31,058 was encumbered prior to 6/30/2015 and will be requested for carryover
- \$27,204 was awarded to bureaus but not expended or encumbered by 6/30/2015
- \$ 5,762 was not awarded

Office of Equity & Human Rights – FY 2015/16 Fall BMP

Prior Year Decision Package Status Update

2. OE_008 – ADA Transition Plan Carryover

Refer to status update above provided for decision package *OE_06 – ADA Transition Plan Transfer*.

3. OE_006 & OE_007 – Black Male Achievement Program

While the Adopted Budget created a permanent BMA Coordinator starting in FY 2015-16, these two Spring BMP decision packages established:

- One-time personnel and M&S funding for the Black Male Achievement program in FY 2014/15.
- One-time M&S funding for the BMA program in FY 2015/16

The position was created and filled during FY 2014/15 and the M&S budget allowed seven individuals key to the local BMA initiative to attend the national Cities United Conference. In FY 2015/16, the program coordinator continues to manage BMA efforts. The M&S budget will cover expenses for 20 summer youth to participate in a specific program overseen by several members of the steering committee; travel to a conference for the Program Coordinator; food and refreshments for steering committee meetings; and printing and materials for the program.

4. Culturally Specific Mentorship (OE_010)

Refer to status update above provided for decision package *OE_02 – Pilot Culturally-Specific Mentorship Program*.

Office of Equity & Human Rights

Performance Measures

Performance Measure	Type	FY 2012-13 Year-End Actuals	FY 2013-14 Year-End Actuals	FY 2014-15 Adopted Budget	FY 2014-15 Revised Budget	FY 2014-15 Year-End Actuals
OE_0014 - Percentage of bureaus whose leadership teams have completed OEHR Equity 101 Training	KPM					62%
OE_0015 - Percentage of bureaus whose entire workforce has completed OEHR Equity 101 Training	EFFECTIVE					36%
OE_0016 - Percentage of bureaus that have begun implementation of their Racial Equity Roadmap	KPM					0%
OE_0019 - Number of requests to PCOD for advice, consultation, or technical assistance by City bureaus or elected officials	WORKLOAD					6
OE_0021 - Number of HRC advisements, consultations, or technical assistance provided to City bureaus and elected officials offices	EFFECTIVE					3
OE_0023 - Number of bureau consultations regarding Title II / Title VI	WORKLOAD					52
OE_0025 - Number of requests by City bureaus or elected officials for equity consultation or technical assistance	WORKLOAD					10
OE_0026 - Number equity consultations resulting in change in policy, practice or service	EFFECTIVE					4
OE_0028 - Percentage of City management that are employees of color	KPM	14%	14%	0%		15%
OE_0030 - Percentage of bureaus that have translated essential documents into the ten safe harbor languages	KPM					0%
OE_0032 - Percentage of Council-appointed boards and commissions that meet minimum standard for diverse membership	KPM					0%
OE_0033 - Number of City bureaus who have contacted OEHR to assist in developing their Title VI Compliance Review/Assessment	WORKLOAD					0
OE_0034 - Percentage of City bureaus that have met their annual ADA Transition Plan goals/objectives	KPM					0%

Office of Equity & Human Rights

Performance Measures

Performance Measure	Type	FY 2012-13	FY 2013-14	FY 2014-15	FY 2014-15	FY 2014-15
		Year-End Actuals	Year-End Actuals	Adopted Budget	Revised Budget	Year-End Actuals

Performance Measure Variance Descriptions

OEHR's performance measurement structure has been revised in order to improve the bureau's ability to assess progress towards organizational goals. This new structure was created during the FY 2015-16 budget process. That being the case, there is no data available or applicable for the prior years. However, the bureau has identified the FY 2014-15 baseline for each measure, established targets for FY 2015-16 and created an infrastructure for tracking and trending this data.

[OE_0015 – Percentage of bureaus whose entire workforce has completed OEHR Equity 101 Training] - Previously, the bureau tracked simply the number of trainings provided and the number of staff trained. This new measure is more focused on the desired outcome.

[OE_0016 – Percentage of bureaus that have begun implementation of their Racial Equity Roadmap] - Previously, the bureau tracked the number of bureau equity plans reviewed annually. While the bureau does still review bureau equity plans, this measure is more focused on the desired outcome (i.e., bureaus implementing racial equity plans).

[OE_0019 – Number of requests to PCOD for advice, consultation, or technical assistance by City bureaus or elected officials] - Previously, the bureau tracked the number of PCOD meetings and activities held. This new measure will more accurately track and assess PCOD's effectiveness.

[OE_0021 – Number of HRC advisements, consultations or technical assistance provided to city bureaus and elected officials] - Previously, the bureau tracked the number of HRC meetings and activities held. This new measure will more accurately track and assess HRC's effectiveness.

[OE_0026 – Number of equity consultations resulting in change in policy, practice or service] - Previously, the bureau tracked only the number of bureaus receiving equity technical support & consulting. This new measure is more focused on the desired outcome.

[OE_0028 – Percentage of City management that are employees of color] - This measure shows slight progress in FY 2014-15. For perspective, OEHR asked the EBS team to create a demographic dashboard for the City's workforce. This was the first time this data was presented in a public, transparent manner and it supports the City's commitment to and accountability for improving workforce diversity.

Prior Year Business Area Reconciliation Report

	FY 2014-15 Revised Budget	FY 2014-15 Year-End Actuals	Percent of Actuals to Revised
Office of Equity & Human Rights			
EXPENDITURES			
Personnel Services	\$1,279,628	\$1,273,388	100%
External Materials and Services	\$276,100	\$194,043	70%
Internal Materials and Services	\$151,468	\$149,412	99%
Fund Transfers - Expense	\$0	\$0	0%
TOTAL EXPENDITURES	\$1,707,196	\$1,616,843	95%
REVENUES			
Charges for Services	\$1,411	\$2,912	206%
Interagency Revenue	\$30,076	\$30,076	100%
Fund Transfers - Revenue	\$22,740	\$22,740	100%
General Fund Discretionary	\$934,694	\$0	0%
General Fund Overhead	\$718,275	\$0	0%
TOTAL REVENUES	\$1,707,196	\$55,728	3%

Bureau Reconciliation Narrative

OEHR remained within its general fund budget during FY 2014-15, both overall and at the major object category level. The external materials & services category was 30% underspent -- approximately \$82,000 -- at year-end for a few reasons. \$43,366 is associated with encumbrances the bureaus is requesting for carryover in the Fall BMP. \$27,000 was awarded to bureaus as part of the \$100,000 translation fund created in the FY 2014-15 Fall BMP, but that the bureaus ultimately failed to spend or encumber by year-end. Last another \$13k was unspent from the Human Rights Commission's programmatic budget.