



## **FY 2017-18 Budget Kickoff**

November 16, 2016

1:30 – 2:30

The Portland Building Auditorium

### **Agenda**

Budget Guidance	Andrew Scott
Performance Management	Shannon Carney
Economic Outlook <ul style="list-style-type: none"><li>◆ Available Resources</li><li>◆ CAL Targets</li></ul>	Josh Harwood
Budget Process <ul style="list-style-type: none"><li>◆ Important Dates</li><li>◆ Requested Budget Submittal</li><li>◆ General Fund Overhead</li></ul>	Jeremy Patton
Budget Equity Tool	Dante James
BRASS & PatternStream <ul style="list-style-type: none"><li>◆ General Updates</li><li>◆ SBFS Deadlines</li></ul>	Yung Ouyang
OMF Interagencies	Aaron Beck

# FY 2017-18 Budget Guidance

## Reduction Options

### Public

#### Safety/Housing

- 2.0% reduction options
- Focus on regionalization of services and leveraging technology

### General Fund Bureaus

- 5.0% reduction options
- Focus on programs that are outside core mission

### Non-GF Bureaus

- Reductions and efficiencies designed to keep fee and rate increases as low as possible

Bureaus should expect a 1.0% reduction in General Fund discretionary in order to prepare for an economic slowdown

## Program Expansions

### One-Time

- Investments to decrease long-term costs or increase revenue

### Ongoing

- Affordable housing
- Reducing homelessness
- Critical infrastructure

# FY 2017-18 Budget Process

## **Draft Budget Calendar**

Bureaus/PDC submit Requested Budgets, Five-Year Plans, and CIPs,	January 30
City Budget Office Requested Budget reviews distributed to Council	March 6
Council budget work sessions	Mar 13-31
Public Hearings on Requested Budgets (2 hearings)	April 11 & 18
Mayor releases Proposed Budget decisions	April 27
Revised General Fund financial forecast released	April 30
Proposed Budget document available	May 8
Budget Committee – Mayor’s Message and work session	May 9
Budget Committee public hearing on City and PDC budgets	May 11
Budget Committee action to approve City and PDC budgets	May 17
Approved Budget submitted to Tax Supervising & Conservation Commission	May 18
First Utility Rate Review hearing	May 18
Utility Rate Review – second reading	May 24
Tax Supervising & Conservation Commission hearing on Approved Budget	June 7
Council action to adopt budget	June 8

## **Council Budget Work Sessions**

Tuesday, March 14 <sup>th</sup>	9:30 am to 1:00 pm	3.5 hours
Thursday, March 16 <sup>th</sup>	9:30 am to 12:30 pm	3 hours
Tuesday, March 21 <sup>st</sup>	9:30 am to 12:30 pm	3 hours
Thursday, March 23 <sup>rd</sup>	9:30 am to 12:30 pm	3 hours
Tuesday, March 28 <sup>th</sup>	9:30 am to 1:00 pm	3.5 hours
Thursday, March 30 <sup>th</sup>	9:30 am to 12:30 pm	3 hours

## **Components of the Requested Budget Submittal**

1. Cover page
2. Cover letter signed by the Commissioner in Charge
3. Budget Advisory Committee Report (a minority report may also be included)
4. Patternstream documents, including:
  - a. Organization chart
  - b. Narratives (see the Writers Guide to the Micro-Documents section in the Budget Manual)
  - c. Performance measure data and graphs
  - d. Fund summaries
  - e. Capital project details
5. Decision package summaries (BRASS Report D2 if applicable)
6. Five-year financial plan (if applicable)
7. Fee Study – if not included in financial plan (if applicable)
8. Budget Equity Assessment Tool (also submit copy to Office of Equity & Human Rights)
9. Percent for Art Eligibility Forms (submit only an electronic copy to CBO if applicable)



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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.

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BUREAU/OFFICE/DEPARTMENT

## **SECTION ONE: BASE BUDGET**

***NOTE:*** *The charge of the Office of Equity and Human Rights is to remove barriers based on race and disability within Portland city government. Bureaus are charged with serving all residents, however this tool focuses specifically on information regarding race and disability.*

1. How have you maximized considerations of equity in your base budget?
2. Are there specific realignments in your base budget that either advance or inhibit equity?
3. Are there specific realignments in your base budget that would advance or inhibit your achievement of equity goals outlined in your bureau's Racial Equity Plan?
4. What funding have you allocated for translation, interpretation and ADA (American's with Disability Act) accommodation including ASL (American Sign Language) interpretation and video captioning?
5. Are there deficiencies in the on-going funding of your base budget that inhibit your bureau's achievement of equity or the goals outlined in your Racial Equity Plan?

## **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 or achieving goals outlined in your bureau's Racial Equity Plan?
  - 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 impacts on how resource allocation includes improving ADA accessibility for people with disabilities. (See Attached Worksheet)
4. Identify impacts on workforce demographics. (Racial Equity Goal #1, Model Employer Resolution)

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

1. How has community engaged with your requested budget, including this tool?
2. How does this budget build the bureau's 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.)
3. 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: Oct. 2016