



**OFFICE of EQUITY
and HUMAN RIGHTS**
CITY OF PORTLAND

Realizing Equity. Enhancing the City of Portland.

Commissioner in Charge:
Ted Wheeler, Mayor

Bureau Director:
Dante J. James, Esq.



To: City Council
From: Dante James 
RE: Office of Equity & Human Rights Fall BMP Submission
Date: Monday, March 27, 2017

The Office of Equity & Human Rights is pleased to offer its Spring Budget Monitoring Process (BMP) submittal. The following represents the key highlights.

BUDGET ADJUSTMENT REQUESTS

1. **Compensation Set-Aside** –OEHR is requesting \$17,000 in Compensation Set-aside in order to cover Personnel Services costs through June 30.
2. **Program Carryover** – OEHR is requesting the carryover of \$42,000 in the Racial Equity Toolkit program.

STATUS REPORTING REQUIREMENTS

OEHR is submitting the following routine status reports:

Decision Package Status Update: OEHR is pleased to report that decision package funded activities are well under way with outcomes as anticipated.

Current Year Budget Note Update: This report updates Council on the status of OEHR's staffing analysis and feasibility study regarding the implementation of a centralized Citywide service delivery model. Report was delivered as part of the Fall BMP.

Year-End Projection: OEHR anticipates it will remain within budget at the major object category level to the end of the fiscal year. This assumes Council approves the various BMP requests submitted.

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

**CBO Discussion and Recommendations
FY 2016-17 Spring BMP**

Bureau: Office of Equity & Human Rights

Type: Compensation Set Aside Request

Request: OE_005 - Compensation Set Aside Request

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
Personnel Services	17,000	0	17,000
TOTAL EXPENDITURES	17,000	0	17,000
REVENUES			
General Fund Discretionary	17,000	0	17,000
TOTAL REVENUES	17,000	0	17,000

Bureau Description:

This request is intended to cover a projected overexpenditure in personnel services cost in the bureau. This situation is the result of full staffing at the bureau for the fiscal year to date, and costs anticipated from employee transitions later in the fiscal year.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2016-17 Spring BMP**

Bureau: Office of Equity & Human Rights

Type: Program Carryover Request

Request: OE_006 - General Fund Program Carryover

	Spring BMP Requested Adjustments	Spring BMP CBO/Council Changes	Spring BMP Total Adjustments
EXPENDITURES			
External Materials and Services	(42,000)	0	(42,000)
TOTAL EXPENDITURES	(42,000)	0	(42,000)
REVENUES			
General Fund Discretionary	(42,000)	0	(42,000)
TOTAL REVENUES	(42,000)	0	(42,000)

Bureau Description:

This request is to reduce appropriations in the Racial Equity Toolkit CoHort program by \$42,000 in order to carry the funds over to FY 17-18 to continue development of the program.

CBO Discussion and Recommendation

Office of Equity & Human Rights

Date of Update: 3/27/2017

Budget Note Title: Staffing Plan

Budget Note Language: Council directs the Office of Equity & Human Rights to carry out an assessment to identify a staffing model that will allow the bureau to balance its programmatic, training, and policy needs in order to meet its mission and mandate as set by Council. This staffing model should include a proposed structure for coordinating Citywide equity efforts across all bureaus. If the Office of Equity determines that additional skillsets or capacity are required to meet its organizational goals, the staffing plan should note opportunities to cross-train existing employees and/or to contract with outside entities to fulfill those needs. The bureau shall provide a staffing plan to City Council by December 1, 2016 so that the recommendations may be discussed prior to FY 2017-18 budget development

Summary Status: Complete

Budget Note Update: In advance of the December 1st deadline set forth in this budget note, OEHR has completed a staffing assessment and proposes a centralized staffing model to serve the growing need of bureaus for technical assistance and education. This centralized model would increase the level of assistance, ensure focused and consistent methodology and practice across bureaus, and promote fiscal efficiency by eliminating the need for additional bureaus to find funding for equity positions. See attached report for detail.

Service Area	Bureau	Package Name	Package Description	Funded In:	Added/ (Reduced) Funds	Added/ (Reduced) FTE	Package Status	Package Update
Community Development	Office of Equity & Human Rights	Provide M&S Budget For BMA Program	This program was established in the FY 2015-16 Adopted Budget, but only provided funding sufficient to support the program coordinator. This request will provide a materials and services budget to support the BMA Summer Youth Experience Program, a collaboration with Worksystem's to provide culturally specific curriculum and support to African American young men in the Summerworks program.	FY 2016-17 Adopted Budget	20,000		In Progress	Program in operation
Community Development	Office of Equity & Human Rights	Realign HRC and PCOD budgets	There has been a lack of equity between the Human Rights Commission (HRC) and Portland Commission on Disability (PCoD) budgets largely due to the fact that PCoD incurs higher accommodation costs in order to support the involvement of many of the commissioners.	FY 2016-17 Adopted Budget	-		Complete	Complete
Community Development	Office of Equity & Human Rights	Program M&S Budget Reductions	This decision package makes targeted reductions in the materials & services budgets for Administration (\$9,873), Training & Education (\$2,000), Civil Rights (\$4,000), Communications (\$1,500). It also eliminates the balance of funding (\$15,012) that came to OEHR for the COCL-COAB program support position over and above projected salary and benefits costs.	FY 2016-17 Adopted Budget	(30,000)		Complete	Complete
Community Development	Office of Equity & Human Rights	Equitable Contracting & Purchasing Commission	Transfers \$25,000 of ongoing General Fund resources from the Office of Management & Finance (General Fund) to the Office of Equity & Human Rights (General Fund) for administration of the Equitable Contracting & Purchasing Commission	FY 2016-17 Adopted Budget	25,000		Complete	Transfer completed
Community Development	Office of Equity & Human Rights	Transfer COCL Support Position	OEHR has been providing space and HR support for the administrative support position for the COAB. The COCL has located a new office that is more accessible to the community and better suited to their needs. This package, in concert with packages submitted by other bureaus, will house the COCL budget within a City Special Appropriation. OEHR may continue to provide limited HR function.	FY 2016-17 Adopted Budget	(90,866)	(1.00)	Complete	Shift has occurred, OEHR providing limited support services
Community Development	Office of Equity & Human Rights	FY 2015-16 Carryover: BMA Contract	OEHR is requesting that Council approve the carry over of \$15,000 general fund resources to support the BMA Summer Works Experience. These funds would specifically allow OEHR to contract with a community-based organization to support the employment-focused activities for the BMA cohort of participants in the larger Summer Works program led by Worksystems, Inc, Multnomah County and the City of Portland.	FY 2016-17 Adopted Budget	15,000		In Progress	Staff are working towards finalizing an agreement for strategic planning services for the program.
Community Development	Office of Equity & Human Rights	FY 2015-16 Carryover: FRE Contract	OEHR is requesting Council appropriate \$40,000 of the revenue associated with the OEHR director's three-month "executive loan" to the City of Oakland in order to carry forward \$40,000 of existing general fund budget into FY 2016-17 to support the Fellowship for Racial Equity (FRE) program. This new program will be a year-long intensive training cohort designed to build organizational capacity to achieve Racial Equity goals throughout the bureaus. The funding will allow OEHR to supplement existing resources by contracting with an outside organization with specific experience in growing organizational capacity to implement racially equitable policies and practices in local government through cohort-model training.	FY 2016-17 Adopted Budget	40,000		In Progress	Funds being requested for carryover to 17-18 in Spring BuMP
Community Development	Office of Equity & Human Rights	Equitable Contracting & Purchasing Commission	On February 25, 2015, ordinance 187030 was passed by Council to establish the Commission on Equitable Contracting and Purchasing (ECPC) to increase inclusion of minorities and women in the workforce on City-funded projects. At the request of the mayor, OEHR is requesting \$35,000 in unspent FY 2015-16 budget from the Mayor's Office to fund a half-time program coordinator to support of the ECPC initiative.	Fall FY 2016-17 BMP	42,170	0.50	In Progress	On hold
Community Development	Office of Equity & Human Rights	Encumbrance Carryover	OEHR is requesting Council approval to carry over \$2,000 to fund the remaining work on a professional services contract for the Culturally-Specific Mentorship Pilot. This pilot program has been successful and is now being implemented more broadly.	Fall FY 2016-17 BMP	2,000		In Progress	Contract continued.
Community Development	Office of Equity & Human Rights	Racial Equity Roadmap Support	OEHR is requesting Council approval for three minor budget adjustments to reallocate \$15,000 to fund part-time staff support of the Racial Equity Roadmap process. This will be accomplished by consolidating staff space to lower office lease costs; reducing employee development budget by 50% on a one-time basis; and realizing \$5,000 of intergovernmental revenue from the City of Oakland for ongoing executive loan services provided by the OEHR director.	Fall FY 2016-17 BMP	5,000		Not Started	Funds from City of Oakland did not materialize

Business Area Projection Report

	Spring BMP Revised Budget	FY 2016-17 YTD Actuals Thru AP8	Spring BMP Year-End Projection	% of Projected Actuals to Revised Bud
Office of Equity & Human Rights				
EXPENDITURES				
Personnel Services	\$1,382,011	\$915,168	\$1,380,000	100%
External Materials and Services	\$130,320	\$47,369	\$125,000	96%
Internal Materials and Services	\$184,025	\$125,323	\$184,000	100%
TOTAL EXPENDITURES	\$1,696,356	\$1,087,860	\$1,689,000	100%
REVENUES				
Charges for Services	\$0	\$1,698	\$2,900	0%
Intergovernmental Revenues	\$5,000	(\$750)	\$0	0%
Interagency Revenue	\$5,126	\$2,563	\$5,126	100%
General Fund Discretionary	\$1,110,489	\$0	\$1,105,233	100%
General Fund Overhead	\$575,741	\$0	\$575,741	100%
TOTAL REVENUES	\$1,696,356	\$3,511	\$1,689,000	100%

Bureau Projection Narrative