



**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, September 11, 2017

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**

OEHR is submitting the following budget adjustment request in the Fall BMP:

- 1. Encumbrance Carryover** – OEHR is requesting Council approval to carry over \$8,425 to fund the remaining work on a professional services contract for the bureaus strategic plan.

### **STATUS REPORTING REQUIREMENTS**

The Fall BMP requires bureaus to perform several status-reporting exercises. The first explains variances between the FY 2016-17 budget and actual expenditures and revenues. The second requirement is for year-end budgetary performance measures, along with explanation of significant variances. The third is an update on the budget note included in the FY 2016-17 Adopted Budget. And the final requirement is for a status update on FY 2016-17 decision packages. Details are available in the content of PHB's BMP submission materials.

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

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**CBO Discussion and Recommendations  
FY 2017-18 Fall Supplemental Budget Ordinance**

**Bureau:** Office of Equity & Human Rights

**Type:** Encumbrance Carryover Request

**Request:** OE\_001 - General Fund Encumbrance Carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
<b>EXPENDITURES</b>			
External Materials and Services	8,425	0	8,425
<b>TOTAL EXPENDITURES</b>	<b>8,425</b>	<b>0</b>	<b>8,425</b>
<b>REVENUES</b>			
General Fund Discretionary	8,425	0	8,425
<b>TOTAL REVENUES</b>	<b>8,425</b>	<b>0</b>	<b>8,425</b>

**Bureau Description:**

This request is for a General Fund encumbrance carryover, reflecting funds that were contractually encumbered, but did not spend in FY 16-17. This contract is for work on the bureaus strategic plan.

**CBO Discussion and Recommendation**

Service Area	Bureau	Package Name	Package Description	Budget Process Funded in:	Year Funded:	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	FY 2016-17	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	FY 2016-17	-		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	FY 2016-17	(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	FY 2016-17	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	FY 2016-17	(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	FY 2016-17	15,000		In Progress	Staff are working with a consultant on the strategic plan. FY 2017-18 fall BuMP request includes an encumbrance carryover for the consulting services.
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	FY 2016-17	40,000		In Progress	Funds were carried over to FY 17-18
Community Development	Office of Equity & Human Rights	FY 2014-15 Carryover: ADA Trans Plan	Pursuant to the FY 2014/15 Spring BMP, this decision package carries forward \$98,723 general fund one-time resources to extend the ADA transition plan program coordinator position through FY 2015/16.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 98,723	1.00	Complete	OEHR expended 100% of this funding for salary and benefits for the ADA transition plan coordinator in FY 2015-16.
Community Development	Office of Equity & Human Rights	FY 2014-15 Carryover: Mentorship Pilot	Pursuant to the FY 2014/15 Spring BMP, this decision package carries forward \$10,000 general fund one-time resources to fund a culturally-specific mentorship pilot program during FY 2015/16.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 10,000		Complete	OEHR expended \$3,602 of this funding in FY 2015-16 and is requesting \$2,000 encumbrance carryover in the Fall BMP to make final payment on a contract.

Community Development	Office of Equity & Human Rights	Transfer New Portlander Program to ONI	Effective December 2, 2014, the New Portlanders Program transferred from the Office of Equity & Human Rights (OEHR) to the Office of Neighborhood Involvement (ONI). This decision package eliminates the program budget and staffing from OEHR's budget while a corresponding decision package in ONI's budget adds back the position and budget.	FY 2015-16 Adopted Budget	FY 2015-16	\$ (113,828)	(1.00)	Complete	This program transitioned to ONI during FY 2014-15.
Community Development	Office of Equity & Human Rights	COCL Admin Position	The Mayor's Proposed budget adds an Assistant Program Specialist, along with \$90,684 in ongoing General Fund discretionary resources, to provide administrative and logistical support for both the Community Oversight Advisory Board (COAB) and the Compliance Office and Community Liaison (COCL) to the Office of Equity. This position is currently housed in the Office of Neighborhood Involvement (ONI) through this fiscal year. This employee serves as the public point of contact for the COCL.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 90,684	1.00	Complete	This position was located in OEHR during FY 2015-16. Effective July 1, 2016, the position is funded from a Special Appropriation. OEHR continues to provide limited supervisory oversight and administrative support to this position.
Community Development	Office of Equity & Human Rights	Black Male Achievement Program Coordinator	Originating as a National League of Cities model for addressing the disparities that exist specifically for Black men and boys, the Black Male Achievement (BMA) initiative is designed to address four specific focus areas: education, employment, criminal justice and community & family stability. In December of 2014, the BMA was moved from the Mayor's office into OEHR as a specific program area. This decision package will serve to institutionalize the BMA initiatives work by supporting its move to the Office of Equity & Human Rights (OEHR) and by creating a full-time permanent program coordinator to staff it.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 100,000	1.00	Complete	OEHR expended 100% of this funding for salary and benefits for the BMA program coordinator in FY 2015-16.
Community Development	Office of Equity & Human Rights	FY 2014-15 Carryover: Black Male Achievement	Pursuant to the FY 2014/15 Spring BMP, this decision package carries forward \$60,000 general fund one-time resources for the Black Male Achievement program during FY 2015/16.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 60,000		Complete	This funding was carried over from FY 2014-15 into FY 2015-16 to provide a program budget for BMA because none was allocated when the program was created. The following summarizes the disposition of these funds.  1. In the FY 2015-16 Spring BMP, OEHR reallocated \$18,600 to personnel services in order to cover the actual salary and benefits costs of the BMA program coordinator (which exceeded original budgeted estimates). 2. Also in the FY 2015-16 Spring BMP, Council approved the carryover of \$15,000 into FY 2016-17. 3. The BMA spent \$13,904 of this funding in FY 2015-16. 4. \$12,496 remained unspent.
Community Development	Office of Equity & Human Rights	FY 2014-15 Carryover: Title VI Translation Pool	Pursuant to the FY 2014/15 Spring BMP, this decision package carries forward \$2,000 general fund one-time resources to fund a Portland Parks & Recreation draw on the Title VI translation/interpretation fund during FY 2015/16.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 2,000		Complete	With this carried over funding, Portland Parks & Recreation spent \$1,602 on translating Community Gardens program information and on sign language interpretation.
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.	FY 2016-17 Fall BMP	FY 2016-17	42,170	0.50	Complete	Program moved to OMF

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.	FY 2016-17 Fall BMP	FY 2016-17	2,000		Complete	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.	FY 2016-17 Fall BMP	FY 2016-17	5,000		Not Started	Funds from City of Oakland did not materialize
Community Development	Office of Equity & Human Rights	General Fund Program Carryover	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.	FY 2016-17 Spring BMP	FY 2016-17	(42,000)		In Progress	Funds were carried over.

PO #	Line Item	PO Date	Vendor No.	Vendor Name	Contract No.	Line Item Text	Cost Object Type	Cost Object No.	Cost Object Name	Fund No.	Bus Area	Funds Centers No.	Commitment Item No.	Functional Area No.	Grant No.	Pur Grp	Buyer	Matri Grp No. & Name	N Val Del	GR	Gds Rcpt	Fnl Inv	DCI	FY 2018 Begin Encumbrances	Date of Last Transaction	Last GR Date Record	FY 2018 GR/IR Transactions	Remaining Encumbrance	Fall BMP Encumbrance Carryover Request
22208036	10	03/14/17	103333	Language Line Services Inc	31000635	Over-the-phone Interpretation Feb 16 Inv	O	8OEOE0000018	Title Vi Translation Fund	100000	OE00	OEOE000001	529000	CDCR00000000000GC	Not Relevant	G99	SKAUTTER	96200 Misc Services			X			245.56	07/01/17	06/12/17	0.00	245.56	
22210237	10	04/17/17	118289	Try Excellence Lic	30005816	16-17 Strategic Planning Services	C	OEOE000001	Office Of Equity	100000	OE00	OEOE000001	521000	CDASADAD000000GC	Not Relevant	P99	ASHOOK	96100 Misc Prof Services			X			8,425.00	07/01/17	04/17/17	0.00	8,425.00	\$ 8,450.00

# Office of Equity & Human Rights

## Performance Measures

Performance Measure	Type	FY 2014-15 Year-End Actuals	FY 2015-16 Year-End Actuals	FY 2016-17 Adopted Budget	FY 2016-17 Year-End Actuals	FY 2017-18 Adopted Budget
OE_0012 - Number of City employees who received equity trainings annually	WORKLOAD	662	1,637	750	0	1,000
OE_0019 - Number of requests to PCOD for advice, consultation, or technical assistance by City bureaus or elected officials	WORKLOAD	6	2	10	0	15
OE_0021 - Number of HRC advisements, consultations, or technical assistance provided to City bureaus and elected officials offices	EFFECTIVE	3	2	5	0	6
OE_0023 - Number of bureau consultations regarding Title II / Title VI	WORKLOAD	52	100	60	0	75
OE_0025 - Number of requests by City bureaus or elected officials for equity consultation or technical assistance	WORKLOAD	10	15	12	0	30
OE_0027 - Percentage of City workforce that are employees of color	EFFECTIVE	18%	20%	18%	0%	25%
OE_0028 - Percentage of City management that are employees of color	KPM	20%	16%	19%	0%	18%
OE_0030 - Percentage of bureaus that have translated essential documents into the safe harbor languages	KPM	0%	48%	90%	0%	60%
OE_0034 - Percentage of ADA Title II Transition Plan barriers removed by City bureaus each year	KPM	23%	34%	90%	0%	60%
OE_0036 - Percentage of City employees that have completed Equity 101 training	KPM	18%	54%	44%	0%	81%
OE_0037 - Number of participants who engaged in BMA sponsored/hosted activities or programs	EFFECTIVE	0	590	200	0	700

**Performance Measure Variance Descriptions**

## Budget Note Update

### Office of Equity and Human Rights

**Date of Update:** July 1, 2016 in PRIOR FY 2016-17 Adopted Budget

**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 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:** September 11, 2017

OEHR has completed a staffing assessment and presented it to the City Council.



## Prior Year Business Area Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
<b>Office of Equity &amp; Human Rights</b>			
<b>EXPENDITURES</b>			
Personnel Services	\$1,359,311	\$1,333,655	98%
External Materials and Services	\$130,320	\$79,528	61%
Internal Materials and Services	\$193,025	\$190,100	98%
<b>TOTAL EXPENDITURES</b>	<b>\$1,682,656</b>	<b>\$1,603,283</b>	<b>95%</b>
<b>REVENUES</b>			
Charges for Services	\$0	\$2,098	0%
Intergovernmental Revenues	\$5,000	\$0	0%
Interagency Revenue	\$5,126	\$5,126	100%
Miscellaneous	\$0	\$1,703	0%
General Fund Discretionary	\$1,096,789	\$0	0%
General Fund Overhead	\$575,741	\$0	0%
<b>TOTAL REVENUES</b>	<b>\$1,682,656</b>	<b>\$8,927</b>	<b>1%</b>

### Bureau Reconciliation Narrative

#### General Fund

#### Expenditures

External Materials & Services - Underexpenditure due primarily to cross-fiscal year timing issues with the Black Male Achievement Program (\$22,000), transitions with the ECPC Program (\$13,000), and lower than anticipated expenditures in the Disability (\$4,900) and Human Rights (\$8,600) Commission budgets.

#### Revenues

Charges for Services - Overcollection due to new fees charged for OEHR performing Equity 101 trainings for non-City agencies.  
 Intergovernmental Revenues: Executive Loan funding with the City of Oakland did not occur; corresponding expenditures did not occur either.