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MEMORANDUM

Date: September 12, 2018
To: Kea Cannon, Assistant Financial Analyst, City Budget Office
From: Suk Rhee, Office of Community & Civic Life Director
Subject: Office of Community & Civic Life FY 2018-19 Fall BMP Submission

Please accept the Office of Community & Civic Life’s (Civic Life) submittal of the FY 2018-19 Fall Budget Monitoring Process. The following items highlight the major changes to the Civic Life Budget in the FY 2019 Fall BMP:

- NI_001 \$151,767** in encumbrance carryover of existing purchase orders/contracts.
- NI_002 \$220,746** in program carryover of outstanding advance encumbrances.
- NI_003 \$245,196** in one-time general fund request for a three phased approach for Census coordination and response.
- NI_004 \$18,1** in one-time general fund request to close PUAH personnel funding gap.
- NI_005 \$614,372** to carry forward as excess Cannabis revenues.
- NI_006 \$20,000** in one-time general fund request to upgrade FileMaker for Information & Referral Required to complete Lifecycle Replacement/Windows 10 upgrade by BTS
- NI_009 \$33,618** re-allocate funds from IA to cover temporary communications needs

Please contact Michelle Rodríguez (503-823-4831) or Michael Kersting (503-823-3040) if you have any questions or concerns.

Cc: Council Offices
Michelle Rodríguez
Michael Kersting

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Encumbrance Carryover Request

Request: NI_001 - Encumbrance Carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	151,767	0	151,767
TOTAL EXPENDITURES	151,767	0	151,767
REVENUES			
General Fund Discretionary	151,767	0	151,767
TOTAL REVENUES	151,767	0	151,767

Bureau Description:

Encumbrance Carryover of \$151,767 of existing purchase orders/contracts entered into in FY17/18 that are continuing to FY 18/19.

The details are listed in the attached worksheet, but the breakdown is:

- \$101,131 for EPAP grants
- \$34,953 for non-profit coalition small grants
- \$15,683 for EPCO small grants
- \$13,329 for NPNS small grants

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Program Carryover Request

Request: NI_002 - Advance encumbrance carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	220,746	0	220,746
TOTAL EXPENDITURES	220,746	0	220,746
REVENUES			
General Fund Discretionary	220,746	0	220,746
TOTAL REVENUES	220,746	0	220,746

Bureau Description:

Encumbrance carryover of \$220,746 for outstanding advances that are expected to be recovered in future years. The details are listed in the attached worksheet, but the breakdown is:

- \$147,406 for EPAP grants
- \$46,776 for Coalition small grants
- \$22,313 for CleanStart PDX grant
- \$4251 for the EPCO community fund grant

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_003 - Census 2020 Coordination & Response

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	20,196	0	20,196
External Materials and Services	225,000	0	225,000
TOTAL EXPENDITURES	245,196	0	245,196
REVENUES			
General Fund Discretionary	245,196	0	245,196
TOTAL REVENUES	245,196	0	245,196
FTE			
Limited Term Positions	0.25	0.00	0.25
TOTAL FTE	0.25	0.00	0.25

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_003 - Census 2020 Coordination & Response

Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Bureau Description:

The mission of the Office of Community & Civic Life is “to promote a culture of civic engagement...” Fundamental to engagement is simply to be recognized as a member of the community. Yet, this is not the reality for many. Predictably, children, young mobile persons, renters, homeless, immigrants and refugees (especially undocumented immigrants and linguistic minorities), American Indians and Alaska Natives, LGBTQ, low income, racial and ethnic minorities and “persons who are angry at and/or distrust the government” are undercounted in each decennial Census (Source: Hard to Count Working Group, US Census Bureau). The consequences are reflected in the inaccurate narratives about the size of communities and diversity of our society, in political representation at every level of government, and in the fiscal appropriation of federal funds.

The Census has been conducted every decade since 1790. Knowledge and predictability of the decennial census is known. Yet, for whatever reasons, the function of preparing for, engaging community and bureau partners, and ensuring a complete count is not institutionalized within Portland’s city government, thus making this request urgent and long overdue. “Counting every person in the country is no easy task — it is the largest peacetime mobilization we undertake as a nation” (Source: U.S. Census Bureau). After consultation with Commissioners offices and city bureaus, the Office of Community & Civic Life proposes to be the convening bureau to coordinate City activities in service of and in partnership with Portland communities and under the direction of their elected officials for each decennial census to come, beginning with the 2020 count.

It is important to recognize that acknowledgment of the need does not immediately translate into bureau capacity to fulfill the role. The best-case scenario is that if this request is approved in November 2018, the bureau and City will have 17 months to prepare for Census Day (April 1, 2020). According to the timeline set by the U.S. Census Bureau, Complete Count Committees and community partners should already be in place and have received training in 2018, with the development of community workplans and strategy to get a complete count beginning in 2019. Waiting for the FY 19-20 budget process will ensure we miss this critical period for preparedness, which we have seen in previous decades as detrimental to the complete count effort.

This request was not included in the FY 18-19 budget proposal as the bureau did not have the opportunity to assess the City capacity for Census preparation (e.g., the director was only five months in her role) nor was the community conversation at the stage of readiness in January 2018. Initial educational activities in the philanthropic community, for example, began only in January 2018. Civic Life began conversations with Commissioners offices, bureaus, philanthropy, and community members in earnest in 2018. Subsequently, the bureau can reallocate some staffing capacity but does not have discretionary funds to assign to this effort. Ninety-two percent of this request invests in building community partner capacity; modest support is requested for a half-time assistant program specialist to provide support to the newly re-written Civic Engagement program coordinator and the Community & Neighborhood Involvement Center program coordinator, whose time will be re-allocated to Census efforts.

What is at stake/What is to be gained:

The City’s ability to coordinate and respond to the decennial count affects:

- Political representation. Decennial census data are used for Congressional apportionment and state legislative re-districting. Oregon stands to gain a sixth seat in the House of Representatives after the 2020 Census—its first such addition in three decades—if current population estimates hold. (Oregon narrowly missed gaining an additional seat in 2010.)
- Financial representation and apportionment. A projected \$675 billion in federal funds will be disbursed annually in part on census data. These include investments in transportation, housing, public insurance, Supplemental Nutrition Assistance Program, Head Start, homeless services, and more (Source: U.S. Census Bureau). Oregon stands to lose \$1,169 per person per year in federal funding for each person not counted on the Census (Source: Counting for Dollars 2020. The Role of the Decennial Census in the Geographic Distribution of Federal Funds. <https://gwipp.gwu.edu/>). As the largest population center in the state of Oregon, if the Portland metropolitan area is undercounted, then the entire state suffers as a result.
- Community identity and emerging electorate. Census data also informs research, academia, City bureau and other administrative decisions.

** Inaccurate counts hamper our ability to make investments and provide services equitably. Many if not all City Bureaus use census data for some level of program functioning. Civic Life, for example, contracts with Portland State University to translate census tract boundaries to neighborhood coalition boundaries and uses this data in the discussion of “funding equity” between neighborhood coalitions.

** Inaccurate counts minimize the community standing of emerging populations and subsequently distorts their representation at all levels of government functioning. For example, in 2016, unmarried women, people of color and young people age 18-29—also referred to as the Rising American Electorate—were responsible for more than 80% of growth in the US population since 2000 and comprised 59.2% of voting-eligible Americans (nearly 133 million eligible voters).

Members of these groups are more likely to have a lower median income, to live in poverty, to be renters and not have health coverage

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_003 - Census 2020 Coordination & Response

Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Members of these groups are more likely to have a lower median income, to live in poverty, to be renters and not have health coverage. This emerging majority are also the predictable hard-to-count populations. Further, within this population, there are those who are also immigrants and refugees, homeless, have children or otherwise culturally or linguistically isolated, also resulting in additional undercounts (Source: The Voter Participation Center).

** Many activities have already taken place for Census preparation, such as address verification. The major phases of the Census effort moving forward as of September 2018 are (as currently defined by the U.S. Census Bureau):

- 2018: Determining state and local Complete Count Committee (CCC) structure and receiving 2020 Census training.

** The critical element of any CCC is identifying, coordinating and capacitating community partners to engage in and leverage their relationships to deliver a complete count. This request addresses this critical and timely step in the process.

- 2019: Continue establishment of CCC's, opening area Census offices, and developing the community workplan and strategy to get to a complete count.

- 2020: Active community mobilization; advertising in early 2020, encouraging self-response.

Census Day is April 1, 2020. Non-response follow-up activities are conducted early April until late July. Apportionment counts are delivered to the President of the United States by December 31, 2020 and redistricting counts released to states by April 1, 2021. The U.S. Census Bureau has already announced that there will be fewer regional Census offices, an emphasis on digital participation and self-response, and less follow up in the 2020 Census. There is widespread concern nationally that these facts and the current political climate will exacerbate the undercount of hard-to-reach populations.

Civic Life role:

The Office of Community & Civic Life has undertaken initial steps to build its institutional capacity to serve in a convening and coordinating role for City efforts for the census. This includes:

- Redesigning and re-classifying the Diversity and Civic Leadership neighborhood program coordinator position to become the Civic Engagement program coordinator to work with the neighborhood coalition offices and Diversity and Civic Leadership cohorts to identify citywide projects of importance to community members; proactively connect and coordinate resources to leverage investments; and provide civic engagement training in formats appropriate to youth, adult-learner and multicultural audiences. Contingent upon securing additional administrative support, this position will staff the Census activities as proposed below in addition to existing responsibilities. (Hire date tentatively October 2018.)

- Meeting with and coordinating with other private funders/philanthropy, community partners and the representative from the Census Bureau's Los Angeles Regional Office (serving a six-state region including Oregon) on the role of a Census Complete Count Committee for the region. Conversations with philanthropic entities have identified the need for coordinating private and public investments to leverage and streamline efforts rather than requiring community partners to spend valuable time managing multiple funding processes, and the need to collectively develop a Portland-metro and Oregon statewide workplan in 2019. Conversations with community partners have revealed that the Census is a priority for culturally specific and multicultural groups as well as concerns that investment will be too little, too late as has happened in previous decades. This lack of planning, coordination and early investment ensures that there will be a scrambled effort at the end lacking strategy and collaboration and taxing the already-stretched capacity of community partners.

- Identifying and communicating with City Council and other bureaus regarding their interest in and contributions to ensuring an inclusive and complete Census count. Current outreach includes Community Technology, Equity and Human Rights, Government Relations, Housing, Planning and Sustainability, Transportation, and Water. The Directors of each of these bureaus affirms the need for investment in Census preparedness and are willing to, or have already identified, a point person on their staff to participate in coordinated efforts (increasing in 2019 and 2020). Additional bureau outreach will follow in the coming months.

This request is the first of three phased investments preparing for, undertaking and utilizing the outcome of the 2020 Census (spanning FYs 18-19, 19-20 and 20-21). The Fall BMP request of \$245,192 represents the initial preparation phase, spanning activities from January 1 to June 30, 2019. FY 19-20 and 20-21 requests are to be determined. As referenced above, Civic Life is part of a larger emerging effort with philanthropic funders. This group has begun to discuss the need for an aligned and possibly pooled funding effort for the 2020 Census. The benefits, tradeoffs and levels of need and investments have not yet been determined. A continued investment at the same level of support, at a minimum, is expected to be required in FY 19-20.

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_003 - Census 2020 Coordination & Response

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Bureau Description: Government and philanthropic efforts are the funding mechanism, but government and philanthropy will not get the job done. Especially in this environment when communities are fearful of and distrust government (at all levels), only trusted community partners will deliver a more accurate count. The strategy to ensure an accurate count is to increase the participation among hard-to-count populations by building the community partnerships and community capacity to 1) segment and connect with hard-to-count populations using existing Civic Life and City bureau networks and infrastructure; 2) identify and bridge gaps within current networks and build new relationships and civic engagement infrastructure within these hard-to-count populations; and 3) identify and engage in the broader regional partnerships required to increase the hard-to-count return (e.g., with the State and Portland Metro complete count committees and philanthropic and civic engagement networks.)

Specifically, Civic Life proposes to invest \$245,192 in the following areas from January 1 – June 30, 2019:

- \$20,000 for a community intermediary organization (identified through a grant process) to assume a multiple-community, multicultural coordinator role focusing on organizations and networks representing and led by hard-to-count communities. Funding would support staffing at minimum of 0.5 FTE; up to 15% corresponding administrative expense; and modest program expenses.

Activities would include but are not limited to: meeting with individual community groups (including but not limited to the eight referenced below); convening these groups to share and train on Census information, timeline and activities; participating in the region’s complete count committee(s); researching best practices and facilitating the development of shared communications and coordinated outreach strategies (see also description below); coordinating broader strategies such as educating community members on upcoming enumeration jobs; and documenting lessons learned for the benefit of future census efforts.

- \$200,000 for eight organizations (identified through a grant process) embedded in and led by hard-to-count communities. Activities are similar to those identified above, but for a more specific subset of the population, e.g., within the African immigrant refugee community. These outreach activities would also include the identification of possible barriers to census self-response (such as who is filling out the census at addresses that house multiple renters or unregistered apartments or identifying households without internet access in anticipation of the emphasis on digital participation in 2020) and developing shared strategies across organizations to address these barriers; and development and implementation of interactive education that helps community members return their form (such as “practicing” filling out the census form or emphasizing the importance of counting children.)

The investments would be in three overall categories—staffing, outreach and accommodations—with actual allocation of dollars across categories proposed by applicants. In preliminary discussions, there are a range of possible organizations responses to this level of support. For example, organizations with sufficient positions in organizing roles will add this to an existing position to leverage existing relationships and coordination. In some cases, this will require the addition of temporary staff to support work that would then have to be reassigned to others. Smaller organizations may use this support to formalize their current organizing efforts, e.g., paying existing volunteer community leaders. Again, applicants will decide the most appropriate model and allocation of dollars for their organizational form.

** \$20,000 each to support staffing at minimum of 0.5 FTE; up to 15% corresponding administrative expense; and modest program expenses.

** \$2,500 each to support targeted outreach efforts for community- and language- specific groups (e.g., Bhutanese refugee community within the Asian Pacific Islander community)

** \$2,500 each for program expenses, language interpretation and other accommodation expenses

- \$5,000 for shared communications and collateral development among the intermediary and eight community-specific organizations. As organizations identify barriers, questions and opportunities within specific groups and share them through the meetings coordinated by the intermediary, there is an opportunity to create shared messages that work across groups and to learn which communities need more specific messages unique to their members. Coordinated efforts will allow the groups to learn and strategize together more effectively than working in isolation.

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_003 - Census 2020 Coordination & Response

Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Bureau Description: \$20,192 for full time assistant program specialist in Civic Life to support current neighborhood coalition and Diversity and Civic Leadership activities. Funds are required to re-direct a portion of the Civic Engagement program coordinator and Community & Neighborhood Involvement Center program coordinator's efforts to administer and monitor these Census-related investments; integrate Census-related activities and goals into existing neighborhood coalition and Diversity and Civic Leadership workplans; participate in the region's complete count committee(s) including in the development of a collective committee/community workplan and measures of success; document efforts and establish processes to institutionalize this function for the future; and coordinate inter-bureau efforts. Examples of the latter include convening city wide partners to share complete count information and materials; developing census-specific messages and outreach materials for distribution among willing city partners; and regularly updating Council offices on key activities.

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CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_004 - Extend PUAH staffing through June 30

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	18,117	0	18,117
TOTAL EXPENDITURES	18,117	0	18,117
REVENUES			
General Fund Discretionary	18,117	0	18,117
TOTAL REVENUES	18,117	0	18,117
FTE			
Limited Term Positions	0.17	0.00	0.17
TOTAL FTE	0.17	0.00	0.17

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_004 - Extend PUAH staffing through June 30

Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Bureau Description:

Portland United Against Hate

Civic Life carried over \$55,000 (\$47,000 for personnel costs) of unexpended PUAH funds from FY17-18 in the Spring BMP. An additional \$39,052 of PUAH one-time funding was added as part of the Mayor's proposed budget (\$35,460 for personnel). Personnel costs are budgeted at \$82,460, total. Expected actual costs of PUAH personnel for FY18-19 is \$100,576.61. This request of \$18,116.61 closes that gap. A funding request for \$203,584 for continuation grants for PUAH community-based organizations is being requested through Special Appropriations. Information about both aspects are included here as context for the community work to be supported through the staffing component.

Funds for PUAH program staff was awarded to Civic Life in FY 17-18. An additional \$350,000 was awarded through Special Appropriations to fund community-based organizations to create and utilize a Hate Incident Tracking Tool to demonstrate proof of concept that people who have been targeted by hate violence are more likely to report hate incidents and seek support if there is a trusted community interface (e.g., rather than reporting to the police or other government entity.) PUAH partners were to use this tool—an online reporting platform—to collect and aggregate hate incident data for increased public awareness and to inform policy leaders and decision-making.

Due to the time required for staff recruitment, grant application and execution process, staffing was not in place until November 2017 and funds were awarded to community partners in February 2018. Subsequently, it was not possible to submit an informed request for funding in the FY 18-19 budgeting process (as proposed budgets were submitted January 2018) and the grants are scheduled to end before the proof of concept is finalized.

After addressing cyber security issues related to the digital platform, the Hate Incident Tracking Tool was released for community testing in August 2018. The tool is a digital platform of three functionally-related parts:

- A secure database for tracking hate activity—launched by, reported to and supported by PUAH-funded community partners—and storing information about available community-based resources.
- A private online dashboard allowing approximately 58-organizational PUAH members (including 13 funded partners) to manage reports and resources stored on the database. .
- A mobile-ready public website for individuals to report hate incidents and find available resources by location, communities served and service type offered by funded and unfunded PUAH partners (for example, safe space, mental health, legal aid) .
- The August release date provides funded partners and the public less than three months to test the system and collect and input data before the current November 1, 2018 grant end date for all grantees acting as points of contact for the system. Final reports will be delivered in October 2018 (for community grants) and December 2018 (for the digital platform). These final reports will inform the submission of any funding request for FY 19-20, as appropriate.

This Fall BMP request is to bridge the gap in staff support between the end of FY 17-18 grants to the end of the FY 18-19 fiscal year to utilize the rapid-response community capacity developed in the previous year in implementing the Hate Incident Tracking Tool. Without gap support, the initial investments in networked community capacity and digital reporting tools will not be realized. Gap support for staffing through Civic Life and, for reference, grants through Special Appropriations, is requested as follows:

- \$18,116.61 to continue the program specialist position through end of FY 18-19. Currently, this position only has a total of \$82,460 allocated of a \$100,576.61 needed, which only funds it through mid-April of 2019.
- \$19,838 to Coalition of Communities of Color to continue to beta test and provide technical support for the community implementation of the Hate Incident Tracking Tool. These funds are for activities from October 1, 2018 to June 30, 2019. This builds upon the FY 17-18 investment of \$35,000 (project period of July 1, 2017 – December 31, 2018) to the Coalition of Communities of Color to develop a customized digital platform for this purpose and to conduct community engagement and analysis on the data. This would support staffing at 0.2 FTE (\$8,250), technical services and database maintenance (\$9,000) and administrative costs (\$2,588).
- \$183,746 for continuing support for 12 organizations to beta test, implement, and support the Hate Incident Tracking Tool from December 1, 2018 through June 30, 2019. This builds upon the initial investment of \$315,000 in FY 17-18 grant funds from July 1, 2017 to Nov 1, 2018 to build and network the capacity of community-specific organizations to deliver resources and responses to incidences of hate activity, including community and media mobilization, provision of supportive and protective services for targeted individuals, trainings for resiliency and intervention, and coordination between community and City bureau responses. The following amounts reflect seven months of support pro-rated from original grant amounts:

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_004 - Extend PUAH staffing through June 30

Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Bureau Description:

- oAfrican Youth Community Organization: \$17,500
- oAs the Spirit Moves Us: \$9,966
- oAsian Pacific American Network of Oregon: \$19,250
- oFair Housing Council of Oregon: \$20,113
- oImmigrant Refugee Community Organization, Africa House: \$10,208
- oLatino Network: \$17,753
- oLewis & Clark Graduate School of Education and Counseling: \$20,416
- oLutheran Community Services Northwest: \$20,416
- oOPAL Environmental Justice Oregon: \$10,208
- oPortland Opportunities Industrialization Center + Rosemary Anderson High School: \$10,208
- oQ Center: \$10,208
- oUnite Oregon: \$17,500

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: GF Revenue Carryover

Request: NI_005 - Cannabis Revenue Carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	614,372	0	614,372
TOTAL EXPENDITURES	614,372	0	614,372
REVENUES			
Interagency Revenue	0	0	0
Fund Transfers - Revenue	614,372	0	614,372
TOTAL REVENUES	614,372	0	614,372

Bureau Description:

Excess revenues over program expenses for the Cannabis Program. This revenue will be added to the Cannabis Licensing Fund #228000.

FY 18-19 Cannabis Licensing Expenses: \$939,928.18

FY 18-19 Cannabis Licensing Revenues: \$1,554,300.61

Difference: \$614,372.43

Cannabis licensing received \$1.55 million with \$964,287 budgeted. The Cannabis program is engaging in a fee study to determine how best to reduce fees.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_006 - Filemaker Upgrade for I&R Database

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
External Materials and Services	20,000	0	20,000
TOTAL EXPENDITURES	20,000	0	20,000
REVENUES			
General Fund Discretionary	20,000	0	20,000
TOTAL REVENUES	20,000	0	20,000

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_006 - Filemaker Upgrade for I&R Database

Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
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Bureau Description:

The Filemaker database for the Information & Referral program has undergone minimal upgrades since 2005. To illustrate, the current database is operating on Filemaker Version 5.0. The current version of Filemaker is Version 17.

This is a need that was uncovered and directed by Bureau of Technology Services during our recent Life Cycle Replacement. BTS informed us migration to Windows 10 is required citywide and that Filemaker 5.0 with Windows 10 creates information security exposure. The software was not even released for Windows 7 and recommended for upgrade during the Windows 7 upgrade. BTS requires Civic Life to mitigate the potential security risk by either pursuing an upgrade to a Windows 10 compatible version or identifying another Windows 10 compatible solution. BTS cannot allow the Filemaker 5.0 version after the migration to Windows 10. As a temporary measure, the Information & Referral team will continue to operate under Windows 7 until the migration is complete. The migration must be completed before January 2020, giving Civic Life very limited time for the vendor to upgrade, prepare documentation, and train the impacted users.

This need was not known in during the development and submission of the FY 18-19 budget and so there is no funding in the current budget to cover this cost. There is \$7,602 in the FY 18-19 external materials and services budget which is allocated for headset replacement and repairs for Information & Referral specialists, professional membership dues (e.g. the Alliance of Information and Referral Systems); staff training and certification fees; office supplies and services (e.g., water service on 3rd floor of City Hall where there is no kitchen); ergonomic chairs and keyboard (for an incoming staffperson to be hired Q2); language line translation, and more.

Aligned with the planning efforts of a 3-1-1 integrated customer service function for the City, Civic Life is proposing a measured investment of \$20,000 for this conversion to address the security concerns and address compatibility with Windows 10, implement long-overdue updates to simplify the database for maintenance, and take advantage of efficiencies and performance-enhancing functions in Filemaker 16. A database designed from the ground up would cost well over this amount. Information & Referral will subsequently upgrade the software as new versions are released to prevent this situation in the future.

While the Information & Referral program would most likely be integrated within a 3-1-1 program early in its development, the Information & Referral database would not be sophisticated or robust enough to be utilized by 3-1-1. A key component of the 311 program is the development of a CRM (Customer Relationship Management) system and that would replace the Filemaker database. The Filemaker database is not a CRM but rather a "knowledge base" which is only one component of an actual CRM. The development of a citywide CRM will be part of the recommendation presented to Council by the 311 Project team this Fall, however actual approval of this recommendation and a timeline for implementation is unknown and implementation is at best a couple of years away if approved.

The following essential tasks will be conducted in the upgrade and migration to Filemaker 17. While this upgrade will ultimately be put out to bid for proposals, the assessment of critical elements and cost are based on an assessment from Allen Poole, the Filemaker consultant engaged by Information & Referral since 2005. Mr. Poole's rate is \$130 per hour.

- Re-establish developer-level access to all files.
- Convert all files to FileMaker 16 file format.
- Identify and resolve all issues associated with the file format change.
- Assess performance and functionality in FileMaker 17 in considering current needs and prospects for ongoing use (or replacement) of the system.
- Revise the application architecture to no longer require resources installed on client workstations (aside from the FileMaker Pro client).
- Test the new version.
- Migrate current data into the new version and deploy.
- Consolidate all tables into one file to simplify security, maintenance, and future development.
- Modify the existing automation only as necessary (instead of re-writing the scripted automation to take advantage of modern performance and efficiency resources) to preserve current functionality in the new Windows 10 and FileMaker 17 environment.
- Leave in place most legacy system components remaining after conversion and identify opportunities for the Information & Referral staff to be trained by the consultant to remove these components.

The following items will need to be discussed and addressed during the conversion process:

- We will retain the existing user interface (from the 1990s) and accept its performance limitations and lesser ease of use rather than completely rebuild in Filemaker's current Cascading Style Sheet design space. However, we will take advantage of easy fixes as identified during the project for enhanced usability.
- We will determine whether we need to develop user and administrator documentation and support tools, contingent upon need and budget.
- We will limit and carefully choose the addition of new features.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Technical Adjustment

Request: NI_007 - Move PUAH funding to correct cost object

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
External Materials and Services	0	0	0
Internal Materials and Services	0	0	0
TOTAL EXPENDITURES	0	0	0
REVENUES			
General Fund Discretionary	0	0	0
TOTAL REVENUES	0	0	0

Bureau Description:

Additional PUAH funds of \$35,840 were added to the Civic Life budget in the Adopted phase, but weren't put into the PUAH functional area. This request moves those funds to the correct functional area.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: New Request

Request: NI_008 - OMF - Procurement Division Design & Construction

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Internal Materials and Services	2,893	0	2,893
TOTAL EXPENDITURES	2,893	0	2,893
REVENUES			
General Fund Discretionary	2,893	0	2,893
TOTAL REVENUES	2,893	0	2,893

Bureau Description:

Increases interagency with OMF Business Operations to assist with Design and Construction. Refer to the associated request from OMF to see the details and learn of possible savings that could offset this increase in Bureau costs.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Technical Adjustment

Request: NI_009 - Communications Staffing Increase

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	33,618	0	33,618
Internal Materials and Services	(33,618)	0	(33,618)
TOTAL EXPENDITURES	0	0	0
FTE			
Limited Term Positions	0.46	0.00	0.46
TOTAL FTE	0.46	0.00	0.46

Bureau Description:

In FY17-18 an IA was created with BDS to support Civic Life communications needs. Due to lack of capacity from that communications team, as positions were still being created, we requested to carry that over into FY18-19. Due to a specific time-sensitive project, in conversation with BDS, we need to move these dollars to cover personnel for a temporary hire we have made. The remaining funds will be paying for the time and efforts expended by the BDS Communications staff.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Technical Adjustment

Request: NI_010 - Re-allocate Rent for EPCO

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

Bureau Description:

Due to the Anderson lawsuit in the water bureau, the rent of \$12 annually paid by East Portland Neighbors to the Water Bureau (as it is a lease on their building) on behalf of the East Portland Community Office is being increased. This re-allocation of funds will help cover the rent increase that begins on January 1, 2019 (of \$805.00mo) until June 30, 2019 for a total of \$4,830.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
 FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Technical Adjustment

Request: NI_011 - Move Flu Shot Expenses Out of Risk

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

Bureau Description:

This technical move covers the IA with OMF in the amount of \$326 for flu shot expenses.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Technical Adjustment

Request: NI_012 - Correction of Cannabis Allocation Fund

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
TOTAL EXPENDITURES	0	0	0
REVENUES			
Charges for Services	0	0	0
TOTAL REVENUES	0	0	0

Bureau Description:

Allocation of the Cannabis Fund Contribution to the PIO position (\$13,620) was showing in the General Fund instead of the Cannabis Fund. This Correction zeroes out the Cannabis budget in the General Fund.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2018-19 Fall Supplemental Budget Ordinance**

Bureau: Office of Neighborhood Involvement

Type: Technical Adjustment

Request: NI_013 - Allocate DCTU Additional Costs

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	0	0	0
TOTAL EXPENDITURES	0	0	0
REVENUES			
General Fund Discretionary	0	0	0
General Fund Overhead	0	0	0
TOTAL REVENUES	0	0	0

Bureau Description:

Late in the budget process, Civic Life was awarded \$35,337 for "additional DCTU costs". These costs are related to the new DCTU contract and were not included in the requested budget. This request allocates the budget for these changes to the appropriate cost centers based on the costs of DCTU employees in each program.

CBO Discussion and Recommendation

Prior Year Business Area Reconciliation Report

	FY 2017-18 Revised Budget	FY 2017-18 Year-End Actuals	Percent of Actuals to Revised
Office of Neighborhood Involvement			
EXPENDITURES			
Personnel Services	\$5,703,051	\$5,533,028	97%
External Materials and Services	\$4,795,821	\$4,184,877	87%
Internal Materials and Services	\$963,928	\$925,059	96%
TOTAL EXPENDITURES	\$11,462,800	\$10,642,965	93%
REVENUES			
Charges for Services	\$1,405,759	\$2,050,953	146%
Intergovernmental Revenues	\$300,807	\$300,807	100%
Interagency Revenue	\$18,461	\$16,915	92%
Miscellaneous	\$3,000	\$35,136	1171%
General Fund Discretionary	\$9,437,180	\$0	0%

Prior Year Business Area Reconciliation Report

	FY 2017-18 Revised Budget	FY 2017-18 Year-End Actuals	Percent of Actuals to Revised
Office of Neighborhood Involvement			
REVENUES			
General Fund Overhead	\$297,593	\$0	0%
TOTAL REVENUES	\$11,462,800	\$2,403,812	21%

Bureau Reconciliation Narrative

Expenses:

Personnel costs and internal Materials & Services expenses were in-line with historical rates. There was a \$23,000 interagency with Facilities that was expected to be charged to FY17-18 that was not. It's uncertain whether this will be fully charged to Civic Life in FY18-19. Better communication with OMF-Facilities would have likely meant we would have carried forward this budget in the Spring BMP.

External M&S Shows as underspent by \$611,000, and only 87% of budget.

The main culprits for this "underspending" can be explained by the carryover of encumbered contracts: \$220,746 for advance encumbrances, and \$151,767 for other encumbered contracts.

The Graffiti program received a major program expansion this year, with \$440,000 of new funding received for the first time. One major contract for pro-active graffiti clean-up was created from this for \$325,000 with the remaining \$115,000 allocated to additional work on the existing referral contracts. Ultimately the graffiti program underspent by almost \$40,000 in external M&S.

Additionally, \$83,860 of EPAP and EPCO grants expected to be encumbered prior to the end of the fiscal year were not executed by the fiscal year end. The Bureau has chosen not to request any carryover of these unexpended funds and will assume the costs of these grants out of existing FY18-19 funding.

The addition of the above mentioned items would leave the bureau much closer to 100% EM&S spending.

Revenues:

Service charges and fee revenues exceeded the budget by 46%.

Cannabis licensing received \$1.55 million with \$964,287 budgeted. The Cannabis Program has already introduced fee reductions to council to address some of the excess revenue collection. Further fee reductions for some types of licenses are also about to be requested. Later this year, a fee study will be implemented to determine if further reductions would be appropriate. Additionally, the Cannabis Program is in the initial stages of exploring the addition of a Cannabis-specific database that may increase the program's annual operating costs.

Noise revenues were \$284,586 on a \$230,000 budget. Strong construction trends continued to allow Noise to exceed revenue expectations once again.

Liquor licenses revenues of \$211,910 on a budget of \$196,000 showed the same minor growth as in years past.

Miscellaneous revenues exceeded the budget by \$32,000, or 1171%.

\$17,000 of this revenue was for reimbursements of North Portland Neighborhood Services staff time that was budgeted in Service Charges & fees, but ended up in this category. \$13,719 of DCTU refunds for employees working on Union items on City time were not budgeted.

All other revenue categories were as expected.

Office of Neighborhood Involvement

Performance Measures

Performance Measure	Type	FY 2015-16 Year-End Actuals	FY 2016-17 Year-End Actuals	FY 2017-18 Adopted Budget	FY 2017-18 Year-End Actuals	FY 2018-19 Adopted Budget
NI_0017 - Number of calls and email inquiries responded to	WORKLOAD	110,742	115,997	115,000	96,652	100,000
NI_0059 - Number of watch groups supported (neighborhood, business, park, foot patrol)	KPM	439	324	380	70	500
NI_0062 - Number of Crime Prevention Through Environmental Design (CPTED) assessments performed (previously "site security assessments")	OUTPUT	192	93	250	35	60
NI_0063 - Percentage of calls answered in less than 25 seconds	EFFICIENCY	93%	93%	90%	9061%	90%
NI_0071 - Number of cannabis applications received	WORKLOAD	0	0	0	167	95
NI_0072 - No. of Cannabis licenses issued & renewed	WORKLOAD	0	0	0	369	385
NI_0076 - Number of new partnerships created with community groups that have not previously been ONI partners	OUTCOME	0	0	0	0	5
NI_0077 - Percentage of crime prevention training participants with increased knowledge of public safety resources	EFFECTIVE	0.0%	0.0%	0.0%	0.0%	70.0%
NI_0078 - One call resolution rate	OUTCOME	0.0%	0.0%	0.0%	2060.0%	25.0%
NI_0079 - Number of repeat complaints citing chronic issues	OUTCOME	0	0	0	0	129
NI_0080 - Timeline (days) to address graffiti incidents (receipt of complaint to resolution)	OUTCOME	0	0	0	0	10
NI_0081 - Number of businesses that receive repeated Time-Place-Manner Warnings	WORKLOAD	0	0	0	0	9
NI_0082 - Number of repeat Time-Place-Manner Warnings issued	WORKLOAD	0	0	0	0	17
NI_0083 - Voter turnout as percentage of eligible voters	KPM	0.0%	0.0%	0.0%	0.0%	0.5%

Office of Neighborhood Involvement

Performance Measures

Performance Measure	Type	FY 2015-16	FY 2016-17	FY 2017-18	FY 2017-18	FY 2018-19
		Year-End Actuals	Year-End Actuals	Adopted Budget	Year-End Actuals	Adopted Budget

Performance Measure Variance Descriptions

NI_0017 Number of calls and email inquiries responded to. Numbers of calls have declined somewhat in the past couple of years as a result of the 2-1-1 social services line implementation in 2006. Call volumes to 503-823-4000 have recently stabilized.

NI_0059 Number of watch groups supported (neighborhood, business, park, foot patrol). The previous numbers had been collected as a cumulative amount, regardless if they had been created in that fiscal year or not. Additionally, they were total of groups that were both inactive, or active without a differentiation of activity level. We are now capturing only what is ACTIVE participation and in that fiscal year. That is why the numbers have such a stark difference.

NI_0062 Number of Crime Prevention Through Environmental Design (CPTED) assessments performed (previously "site security assessments"). The definition of what we are calling a site assessment has changed. We are using a stricter definition of specific things done through CPTEDs, as opposed to the previous performance metric which references site security assessments which had a broader definition and included one-on-one meetings that may not have resulted in any actual CPTED. Hence, we will see a smaller number than previously seen in this performance metric.

NI_0063 Percentage of calls answered in less than 25 seconds. This number has been relatively stable, with no significant changes in the last five years. This demonstrates the purposeful positive customer service response we want to provide community members.

NI_0071 Number of cannabis applications received. We received double the amount of applications previously anticipated. This can be for many reasons and we are seeing leveling out now because of the flooded market.

NI_0072 No. of Cannabis licenses issued & renewed. The number was higher than expected because the market saturation that had been predicted did not happen, in fact the market has shown it still is not fully saturated. This would have resulted in a slowdown in applications received as the State had discussed not processing as many applicants. We are starting to see a slow down now, but last year there was still plenty of applications processed by the State and then by us.

NI_0078 One call resolution rate. This number is to be expected for a metric that we've only been tracking for a couple of years. We have not currently implemented the highly anticipated 311 which would change this significantly. The number remained more or less the same with no notable increase or decrease as we had no staffing changes or methodology changes.

NI_76, NI_77, and NI_79 through NI_83 Are new measures submitted for FY 18-19 and we were not tracking them in FY 17-18
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