

Portland Children's Levy
FY 2020-21
Requested Budget



Office of Mayor Ted Wheeler
City of Portland

MEMORANDUM

January 30, 2020

To: City Budget Office
Commissioner Chloe Eudaly
Commissioner Amanda Fritz
Commissioner Jo Ann Hardesty
Auditor Mary Hull Caballero

From: Mayor Ted Wheeler 

Subject: FY 2020-21 Requested Budget of the Portland Children's Levy

Enclosed for your consideration is the FY 2020-21 budget request for the Portland Children's Levy. The Portland Children's Levy has one program – Investing in Children.

The Portland Children's Levy is funded by a five-year property tax levy projected to generate \$22.7 million in FY 2020-21. The Children's Levy is projected to have a fund balance of \$12.1 million at July 1, 2020 yielding total resources of \$34.8 million.

This budget includes spending of up to \$24.9 million on program grants, including all grants and funds for training and technical assistance of provider personnel. The budget includes \$1.2 million for administration of the fund. The budget also includes contingency funds of \$8.6 million, resulting in total expenditures of up to \$34.8 million.

The budget includes one staffing change, requesting to increase one Grant Manager position from part-time to full-time. This will add \$1,782 to personnel expense as the change is from 0.89 to 0.90 FTE. CBO determined this change was too small to merit a decision package.

The Portland Children's Levy currently funds 74 grant programs with budgets totaling \$19 million. The Portland Children's Levy Allocation Committee will make program funding recommendations for FY 2020-21 in the spring of 2020. These recommendations will be submitted to Portland City Council for review.

The Children's Levy is required to spend no more than 5% of the fund to administer the fund. The Levy is projected to have spent 4.72% of levy funds on administration as of June 30, 2020. That amount is projected to increase to 4.78% at June 30, 2021. The Levy is audited annually for compliance with authorizing legislation.



January 29, 2020

Re: Portland Children's Levy Budget Advisory Committee

The Children's Levy Allocation Committee serves as its Budget Advisory Committee. Current members of the Allocation Committee are:

- Mayor Ted Wheeler
- County Commissioner Jessica Vega Pederson
- Currently vacant – City appointed member
- Felicia Tripp-Folsom – County appointed member
- Mitch Hornecker – Portland business community member

The Allocation Committee makes grant funding recommendations for the Children's Levy. All current grants expire on June 30, 2020. During the winter and spring of 2020, the Allocation Committee will meet to consider funding of grants for FY 2020-21. The funding recommendations of the Allocation Committee will be submitted to Portland City Council for review and approval.

Administrative expenditures of the Portland Children's Levy are capped at 5% of the fund by the authorizing legislation. The Children's Levy is audited annually to ensure compliance with authorizing legislation.



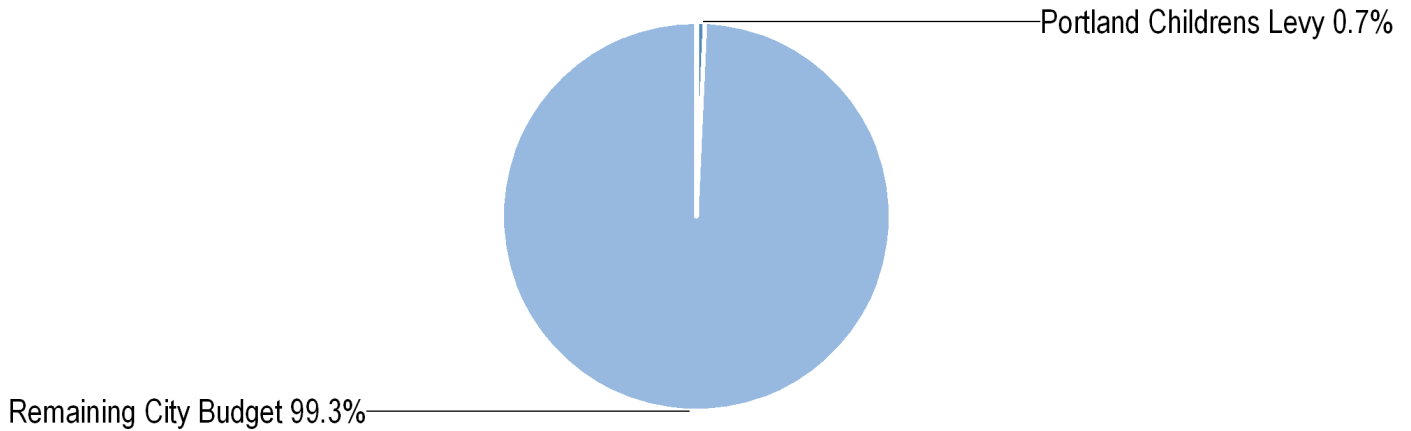
Portland Children's Levy

Community Development Service Area

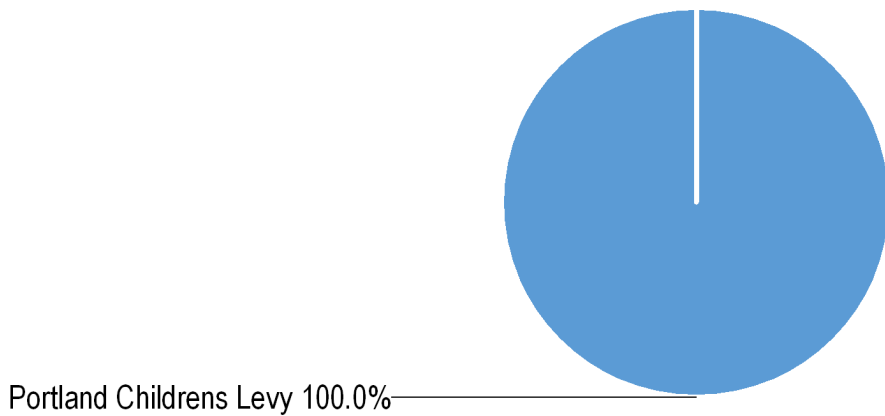
Mayor Ted Wheeler, Commissioner-in-Charge

Lisa Pellegrino, Director

Percent of City Budget Graph



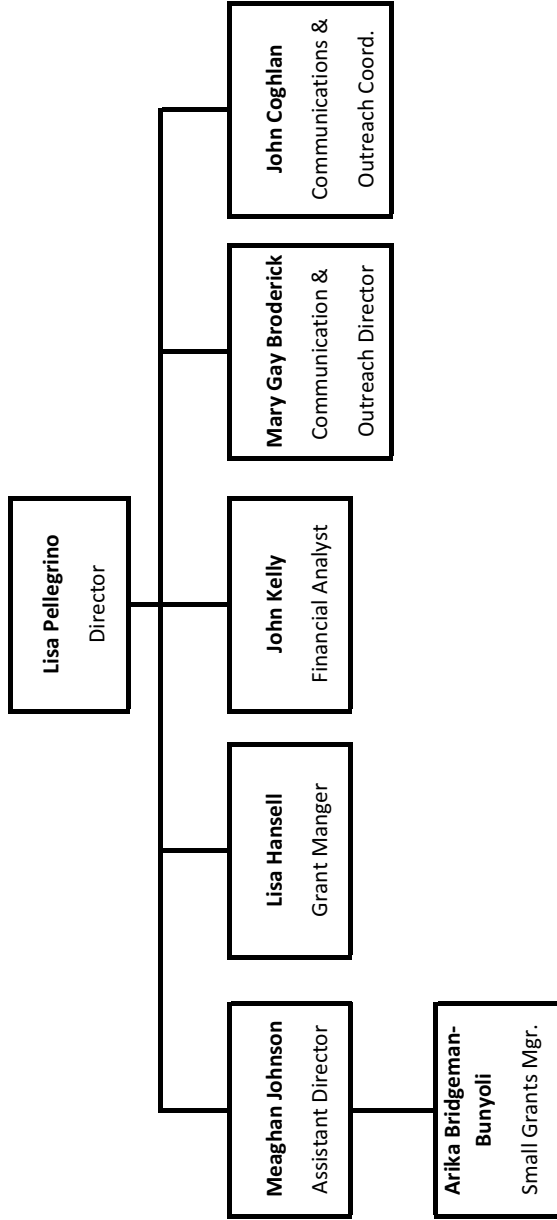
Bureau Programs



Bureau Overview

Requirements	Revised FY 2019-20	Requested FY 2020-21	Change from Prior Year	Percent Change
Operating	\$31,651,282	\$34,756,717	\$3,105,435	10%
Capital	\$0	\$0	\$0	0%
Total	\$31,651,282	\$34,756,717	\$3,105,435	10%
Authorized Positions	6.37	6.38	0.01	0%

Portland Children's Levy



Portland Children's Levy

Bureau Summary

Bureau Mission

The purpose of the Portland Children's Levy (PCL) is to prepare children for school; support children's success inside and outside of school; and reduce racial and ethnic disparities in children's well-being and school success. As prescribed by its authorizing legislation, PCL invests in programs that support children's early development and readiness for kindergarten, prevent child abuse and neglect and support vulnerable families, support children and youth in foster care, connect children and youth with caring adult role models, provide safe and constructive after-school and summer activities, and expand access to healthy, nutritious food for children and their families.

Bureau Overview

The Portland Children's Levy contracts with nonprofit providers and other governments to provide services to children throughout Portland. Funding comes from the proceeds of a five-year property tax levy most recently approved by voters in 2018. Funding categories as provided in the ballot measure language are: Early Childhood; Child Abuse Prevention and Intervention; After School; Mentoring; Foster Care; Hunger Relief

Programs must demonstrate that they are cost effective and have a proven record of success to be eligible for consideration for funding. The Children's Levy Allocation Committee awards grants through a competitive process, and City Council reviews and approves all recommended allocations. The 5-member Allocation Committee includes: a City of Portland commissioner; a Multnomah County commissioner; two members appointed by the Mayor - one from the business community and one citizen with knowledge and experience on children's issues; and a citizen member appointed by the County Commission. No more than 5% of the fund may be spent on administration of the fund. The fund is audited annually to ensure compliance.

Strategic Direction

PCL's adopted goals are to prepare children for school, support children's success inside and outside of school and to reduce racial and ethnic disparities in children's well-being and school success. PCL is in the midst of a competitive funding round for grants in all program areas required by the ballot measure authorizing the Levy (early childhood, after-school, mentoring, hunger relief, foster care and child abuse prevention/intervention). In this funding round, PCL will allocate up to \$68,150,000 over the next three fiscal years to the six program areas. Funding decisions by the Levy's Allocation Committee are set for April 2020 and their 3-year funding recommendations will come before City Council for consideration in May 2020.

Strategic direction for the funding round was set in 2019 through a community engagement process conducted by Empress Rules Equity Consulting designed to gather community input on current needs of children and families and preferred community solutions. The Community Engagement Report can be found at <http://www.portlandchildrenslevy.org/grants/2019-20-funding-round>. Report recommendations focus on equity and inclusion and demonstrate community preference for services that are culturally relevant and responsive, listen and respond to the voice and preferences of youth and families, pay attention to accessibility and address barriers to access, and employ staff who are of and grounded in the cultural communities they serve. Funding applications in each program area reflect these preferences and weight scoring toward organizations and programs that meet these criteria.

The report also included recommendations on types of services desired in each program area. Based on these recommendations, the Levy seeks to fund programs providing the following types of services in the current funding round:

Early Childhood: high quality preschool, home visiting and parenting support, early childhood mental health consultation for practitioners and parents.

Child Abuse Prevention/Intervention: parenting support and training, treatment to lessen harm and prevent future risk, resources for family stabilization.

Foster Care: foster parent support/training, mentoring, transition support, reunification support, advocacy and case management.

After School and Mentoring: academic support, enrichment activities, support for positive social emotional development and building healthy relationships.

Hunger Relief: food resources available at community locations, mobile food resources, training and education for youth and adults related to nutrition, cooking, gardening, and connection to other community resources.

PCL is currently developing a small grants fund to improve equity of access as recommended in a 2019 Portland State University study (see link above for full report). The Committee allocated \$1.5 million for this fund with a focus on funding organizations arising out of communities, serving children and families not served in PCL's larger grants, and building capacity of smaller organizations. PCL hired a Small Grants Fund Manager in November 2019 and plans to publish a funding application for competitive grants in summer 2020, with funding to begin in early 2021.

City Council is currently considering the Allocation Committee's recommendation to continue a \$5.1 million (FY 2021-23) non-competitive grant for the Community Childcare Initiative (CCI). PCL's authorizing legislation permits up to 10% of revenues to be allocated non-competitively for specified purposes. CCI addresses the ballot measure requirement to make childcare more affordable by providing child care subsidies, and also supports childcare provider networks to improve childcare quality.

Summary of Budget Decisions

Base Budget Adjustments	PCL is increasing one Grant Manager position from part-time to full-time to facilitate the person in that position completing their work within the scheduled hours of the position. Over time, the workload of the position has increased.
Major Issues	The Portland Children's Levy (PCL) became a City bureau in FY 2018-19. As a result there are no actuals in FY 2016-17 or FY 2017-18. Actual expenditures are reflected in the Commissioner of Public Affairs' prior year budget figures.

Portland Children's Levy

Summary of Bureau Budget

	Actuals FY 2017-18	Actuals FY 2018-19	Revised FY 2019-20	Requested No DP FY 2020-21	Requested FY 2020-21
Resources					
External Revenues					
Taxes	0	18,191,269	22,001,560	22,702,075	22,702,075
Miscellaneous	0	261,810	0	0	0
External Revenues Total	0	18,453,079	22,001,560	22,702,075	22,702,075
Beginning Fund Balance	0	8,833,331	9,649,722	12,054,642	12,054,642
Resources Total	0	27,286,410	31,651,282	34,756,717	34,756,717
Requirements					
Bureau Expenditures					
Personnel Services	0	468,295	902,324	970,241	970,241
External Materials and Services	0	16,100,523	23,603,572	25,065,677	25,065,677
Internal Materials and Services	0	40,863	53,242	55,502	55,502
Bureau Expenditures Total	0	16,609,681	24,559,138	26,091,420	26,091,420
Fund Expenditures					
Contingency	0	0	7,067,144	8,640,297	8,640,297
Fund Transfers - Expense	0	4,166	25,000	25,000	25,000
Fund Expenditures Total	0	4,166	7,092,144	8,665,297	8,665,297
Ending Fund Balance	0	10,672,563	0	0	0
Requirements Total	0	27,286,410	31,651,282	34,756,717	34,756,717
Programs					
Portland Children's Levy	—	16,609,681	24,559,138	26,091,420	26,091,420
Total Programs	—	16,609,681	24,559,138	26,091,420	26,091,420

FTE Summary

Class	Title	Salary Range		Revised FY 2019-20		Requested No DP FY 2020-21		Requested FY 2020-21	
		Min	Max	No.	Amount	No.	Amount	No.	Amount
30003006	Analyst I	53,290	102,648	1.00	46,202	1.00	79,204	1.00	79,204
30003007	Analyst II	63,336	109,491	1.00	97,980	1.90	192,029	1.90	192,029
30003008	Analyst III	69,805	131,248	1.00	121,493	1.00	121,493	1.00	121,493
30003028	Coordinator II	53,290	102,648	1.00	81,193	1.00	81,193	1.00	81,193
Total Full-Time Positions				4.00	346,868	4.90	473,919	4.90	473,919
30003007	Analyst II	63,336	109,491	0.89	92,743	0.00	0	0.00	0
30003055	Financial Analyst II	63,336	109,491	0.80	79,772	0.80	79,772	0.80	79,772
30003097	Public Information Officer	63,336	109,491	0.68	73,907	0.68	73,907	0.68	73,907
Total Part-Time Positions				2.37	246,422	1.48	153,679	1.48	153,679
Grand Total				6.37	593,290	6.38	627,598	6.38	627,598



Fund Summary

	Actuals FY 2017-18	Actuals FY 2018-19	Revised FY 2019-20	Requested No DP FY 2020-21	Requested FY 2020-21
Resources					
External Revenues					
Taxes	19,470,531	21,341,923	22,001,560	22,702,075	22,702,075
Miscellaneous	195,154	342,157	0	0	0
External Revenues Total	19,665,685	21,684,081	22,001,560	22,702,075	22,702,075
Beginning Fund Balance	7,024,767	8,833,331	9,649,722	12,054,642	12,054,642
Resources Total	26,690,452	30,517,412	31,651,282	34,756,717	34,756,717
Requirements					
Bureau Expenditures					
Personnel Services	624,624	717,233	902,324	970,241	970,241
External Materials and Services	17,144,074	19,043,377	23,603,572	25,065,677	25,065,677
Internal Materials and Services	63,424	59,239	53,242	55,502	55,502
Bureau Expenditures Total	17,832,122	19,819,849	24,559,138	26,091,420	26,091,420
Fund Expenditures					
Contingency	0	0	7,067,144	8,640,297	8,640,297
Fund Transfers - Expense	25,000	25,000	25,000	25,000	25,000
Fund Expenditures Total	25,000	25,000	7,092,144	8,665,297	8,665,297
Ending Fund Balance	8,833,331	10,672,563	0	0	0
Requirements Total	26,690,453	30,517,412	31,651,282	34,756,717	34,756,717

Fund Overview

The Children's Investment Fund was established in FY 2002-03 to account for the revenues and expenditures related to the Portland Children's Levy. This levy was most recently renewed by Portland voters in May 2018. The current levy authorizes the ongoing revenue generation and operation of the Portland Children's Investment Fund through June 30, 2024.

Decisions on grant expenditures of the Children's Levy are made by a five-person committee and approved by City Council. Administrative expenditures are capped at 5% of the fund by law. All allocations must be made in conformance with the levy language as approved by voters.

Managing Agency Portland Children's Levy

Significant Changes from Prior Year

Revenues from the Portland Children's Levy are projected to increase in FY 2019-20 due to continued rising property tax revenues, growing by an estimated \$996,000 or 4.6% from the FY 2019-20 Revised Budget.

Investing in Children

Program Description & Goals

The purpose of the Portland Children's Levy is to prevent childhood hunger, to help children arrive at school ready to learn, to provide safe and constructive after-school alternatives for students, to prevent child abuse and neglect, and to help children in foster care succeed.

Measure Title	PM 2017-18 Actuals	PM 2018-19 Actuals	PM 2019-20 Target	PM 2020-21 Target	Strategic Target
Number of children served	12,000	12,000	12,000	10,500	10,500
Number of administrative cost audits	1	2	1	1	1
Number of grant contracts managed	74	74	70	70	70

Explanation of Services

The Portland Children's Levy contracts with nonprofit providers and educational institutions to provide services to children throughout Portland. Funding comes from the proceeds of a five-year property tax levy, most recently approved by voters in 2018, and is estimated to provide \$22.7 million in FY 2020-21. The Children's Investment Fund is projected to have a fund balance of \$12.1 million on July 1, 2020. Fund balance has accrued due to revenues exceeding projections on which grants are made and unspent grant balances. In order to maintain stable funding levels over time, this fund balance will be invested in multi-year grants and spent down over the next 5 years. Funding categories required in the ballot measure language are: Early Childhood; Child Abuse Prevention and Intervention; After School; Mentoring; Foster Care; and Hunger Relief. Programs must demonstrate that they are cost effective and have a proven record of success to be eligible for consideration for funding. The Children's Levy Allocation Committee recommends grants through a competitive process. The 5-member Allocation Committee includes: a City of Portland commissioner; a Multnomah County commissioner; two members appointed by the Mayor - one from the business community and one citizen with knowledge and experience on children's issues; and a citizen member appointed by the County Commission. Portland City Council approval is required for grants to be funded. Under provisions of the Levy, no more than 5% of the fund may be spent for expenses associated with administering the fund. The fund is audited annually to ensure compliance. In the spring of 2019, the Allocation Committee recommended renewal of 70 grants for one year, beginning July 1, 2019; City Council approved these recommendations. The total grant budgets for FY 2019-20 is \$19 million. In the spring of 2020, the Children's Levy Allocation Committee will make recommendations for funding of new, three-year grants to begin July 1, 2020. These funding recommendations will be submitted to City Council for review and approval.

Equity Impacts

The Children's Levy requires all funded programs to report demographics on children served (gender, age, race/ethnicity identification(s), primary language spoken in the home, zip code of residence or school attended or homeless status, household income and disability status). The Levy also disaggregates service and participation data to assure that programs serve disproportionately higher percentages of traditionally underserved populations (as compared to the percentage of the school population or other relevant comparison population such as population in foster care), and that these children and youth meet program participation goals. This data is reported annually. Data from 2018-19 shows that 70% of the children served in PCL funded programs were of color. Data also show similar proportions of children of color enrolling and meeting participation goals in programs. This data indicates that children of color are accessing Levy funded programming and programs are successfully engaging children. This data has been consistent for the past five fiscal years. See <https://www.portlandchildrenslevy.org/about-us/performance-and-results> for detailed reporting on demographics of populations served, program participation rates and outcomes of children/parents.

Changes to Program

Services and activities for the Children's Levy are substantially similar to those in prior years. We are requesting to change one Grant Manager position from part-time to full-time beginning July 1, 2020. This change will allow the work of this position to be done during scheduled working hours.

Program Budget

	FY 2017-18 Actuals	2018-19 Actuals	2019-20 Revised	2020-21 Requested with DP
Bureau Expense				
External Materials and Services	0	16,053,154	23,450,000	24,916,667
Sum:	0	16,053,154	23,450,000	24,916,667

Resources: Funding comes from the proceeds of a five-year property tax levy, most recently approved by voters in 2018, and is estimated to provide \$22.7 million in FY 2020-21. The Children's Investment Fund is projected to have a fund balance of \$12.1 million on July 1, 2020

Expenses: The Children's Levy is budgeting \$24,916,667 for program expenditures in FY 2020-21. The Children's Levy plans to spend up to \$1,217,949 to administer the fund in FY 2020-21; this figure is 4.7% of budgeted expenditures for the fiscal year.

Staffing: The Children's Levy employs 7 individuals who work 6.38 FTE. The Levy is led by the Director and Assistant Director who also serve as Grant Managers. One additional Grant Manager who will increase from 0.89 FTE to 0.9 FTE as of July 1, 2020 works for the Levy. Beginning in FY 2019-20, the Levy employs a Small Grants Fund Manager. The Levy also employs a Communications and Outreach Coordinator; Communications and Outreach Director and a Financial Analyst.

Assets and Liabilities: The Children's Levy is projected to begin FY 2020-21 with a fund balance of \$12.1 million. The Levy has no liabilities.

Program Information

Bureau: Portland Children's Levy

Program Contact: Lisa Pellegrino

Website: www.portlandchildrenslevy.org

Contact Phone 503.823.2939

Form Header Org	Program	Program Description & Goals	Length	Explanation of Services Length	Changes to Program Length	Resources Length	Expenses Length	Staffing Length	Assets and Liabilities Length	Equity Impacts Length
CL	CDCIIC		281	2,091	297	264	240	461	119	1,276

Measure Title	YTD Actual Calculation	PM 2017-18 Actuals	PM 2018-19 Actuals	PM 2019-20 YTD Actual	PM 2020-21 Target
Number of children served	0	12,000	12,000	0	10,500
Number of administrative cost audits	0	1	2	0	1
Number of grant contracts managed	0	74	74	0	70

**1 Strategic
Target**

10,500

1

70

Portland Children's Levy

Friday, January 24, 2020

PM1. Report for FY 2020-21 Requested Budget

10:50:07 AM

EFFICIENCY MEASURES

Performance Measure	KPM	FY 2016-17 Actuals	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 YTD Actuals	FY 2020-21 Target	Strategic Target
PA_0001 Administrative cost as percentage of cumulative tax revenue		5%	5%	5%	5%	0	5%	5%

OUTPUT MEASURES

Performance Measure	KPM	FY 2016-17 Actuals	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 YTD Actuals	FY 2020-21 Target	Strategic Target
PA_0002 Number of children served		11,500	12,000	12,000	12,000	0	10,500	10,500

WORKLOAD MEASURES

Performance Measure	KPM	FY 2016-17 Actuals	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 YTD Actuals	FY 2020-21 Target	Strategic Target
PA_0003 Number of administrative cost audits		1	1	2	1	0	1	1
PA_0004 Number of grant contracts managed		69	74	74	70	0	70	70

MEASURES

City of Portland
Portland Children's Levy

PM1. Report for FY 2020-21 Requested Budget

Run Date & Time

Friday, January 24, 2020

10:50:07 AM

	Performance Measure	KPM	FY 2016-17 Actuals	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 YTD Actuals	FY 2020-21 Target	Strategic Target
CL_0005	Number of children served in Hunger Relief programs		0	0	0			10,000	0
CL_0006	Percent of children in early childhood services programs who met age appropriate developmental milestones		0	0	0			85	0
CL_0007	Percentage of parents participating in child abuse prevention and intervention programs who met parenting goal		0	0	0			80	0
CL_0008	Percentage of foster youth served who met academic goals		0	0	0			85	0
CL_0010	Percentage of youth in after-school programs who met youth development goals		0	0	0			80	0
CL_0011	Percentage of youth in mentoring programs who met school engagement goals		0	0	0			85	0

Portland Children's Levy - Children's Investment Fund
Financial Plan for the Duration of the Current Levy Authorization

	2020 est	2021 est	2022 est	2023 est	2024 est
Beginning Fund Balance	10,566,618	12,054,642	8,622,101	5,786,748	3,899,238
Revenue					
Current year property taxes*	21,300,263	22,456,693	23,198,199	24,246,139	25,054,304
Prior year property taxes	230,540	245,382	258,111	267,821	279,604
Interest**	175,000				
Total Resources	32,272,421	34,756,717	32,078,411	30,300,708	29,233,146
Expenditures					
Grants Total	18,969,819	24,666,667	24,766,667	24,816,667	25,388,000
Other Program Costs***	100,000	250,000	250,000	250,000	250,000
Personnel Services	930,262	988,437	1,037,859	1,089,752	1,144,239
External M&S - administrative	139,456	149,010	154,970	161,169	167,616
Internal M&S - administrative	53,242	55,502	57,167	58,882	60,649
Gen Fund Overhead	25,000	25,000	25,000	25,000	25,000
Total Expenditure	20,217,779	26,134,616	26,291,663	26,401,470	27,035,504
Ending Fund Balance	12,054,642	8,622,101	5,786,748	3,899,238	2,197,641

* Property tax revenue estimates are provided by City Economist.

** Reliable estimates of interest revenue are not available. In order to be conservative, no estimate is included.

*** Other Program Costs include training and technical assistance for grantee staff.

City of Portland
Requested Budget Equity Report

Portland Children's Levy

Requested Budget & Racial Equity Plan Update:

PCL transitioned out of a Commissioner's office to a separate bureau at the end of 2018 and has not adopted a formal racial equity plan yet. Efforts to improve racial equity in Levy funding have been focused on priorities identified through community engagement and changes to the grantmaking process as discussed below.

PCL seeks to advance equity through funding programs benefiting a diverse population of children and their families. Programs funded through the Portland Children's Levy have served approximately 70% children of color in each of the last five years. Data for the past 5 years also show that children of color met program participation goals in the same proportion as they enrolled in programming. In FY 2018-19, children served in Levy funded programming identified as follows:

- Latinx/Hispanic: 22.5%
- African American: 17.5%
- Multiracial: 13.8%
- Asian: 6.7%
- African: 3.7%
- American Indian/Alaska Native: 2.0%
- Slavic: 1.3%
- Native Hawaiian/Pacific Islander: 1.1%
- Middle Eastern: .7%
- White: 24.6%
- Not Given: 5.9%

In contrast, 51.2% of children attending Portland schools (PPS, Centennial, Parkrose, David Douglas, Reynolds) identified as of color in 2018-19.

PCL monitors the percentage of investments in culturally specific services, and in programs providing services to children living or going to school in East Portland. In 2018-19, 33% of PCL resources were invested in culturally specific services, and 42% of children served lived or went to school East of 82nd Avenue.

In preparation for conducting the funding round currently underway, PCL worked with Portland State University to conduct a qualitative study of its grantmaking process. PSU conducted interviews and focus groups composed of current PCL grantees, organizations that do not receive PCL funding, and other community funders and made a series of recommendations for improvement focused on equity and transparency. The report recommended 30 process improvements including:

- Require all funding application questions be submitted in writing and publish all questions and answers.
- Provide application score sheets to applicants prior to funding decisions.
- Operationalize culture as race/ethnicity in the funding application.
- Require at least 51% program and agency staff, and board of directors identify as a person of color to earn points for reflectiveness of organization serving populations that are majority of color.
- Assure equal application of testimony limits for all applicants, and assure additional time is provided for people requesting interpretation.

City of Portland
Requested Budget Equity Report

- Implement a more robust conflict of interest policy for Allocation Committee members.
 - Create a small grants fund to improve equity of access, support organizations growing out of diverse communities, and build capacity to apply for larger PCL grants.
- For the full report see <http://www.portlandchildrenslevy.org/grants/2019-20-funding-round> or the link to the PDF below.

PCL adopted and operationalized the majority of report recommendations and redesigned the funding criteria and process. The revised application template and scoring criteria are attached and referenced below. Process changes included:

- Requiring written and published questions/answers in the funding application stage
 - Requiring volunteer reviewers to apply and provide information on their experience and knowledge about PCL program areas and equity;
 - Training reviewers and providing practice scoring exercises;
 - Offering a stipend for volunteer reviewers;
 - Prohibiting advocacy by applicants to Allocation Committee members outside of public testimony after the submission deadline;
 - Allowing written testimony to be submitted;
 - Providing for video recording of live testimony at convenient community locations and flexible times with interpretation if needed, and additional time for testimony that is interpreted;
 - Adopting revised bylaws for the Allocation Committee that detail conflict of interest rules and conform to the requirements of the Office of Community and Civic Life.
- PCL has also begun implementation of a small grants fund that will employ a two-step funding process as recommended in the report. The small grants fund is in the design phase and will begin grantmaking in the next fiscal year.

PCL worked with Empress Rules Equity Consulting to gather community input on current needs of children and families and preferred community solutions. Report recommendations (see link below for full report) demonstrate community preference for services that are culturally relevant and responsive, listen and respond to the voice and preferences of youth and families, pay attention to accessibility and address barriers to access, and employ staff who are of and grounded in the cultural communities they serve. These priorities along with preferences for services in each program area were incorporated into the final funding strategies and application. See final program area strategies at: http://www.portlandchildrenslevy.org/sites/default/files/PCL%20Program%20Area%20Strategies%202020-19.FINAL_.06.24.19_0.pdf. PCL expects grants made in spring 2020 will reflect these equity priorities as well as funding programs that primarily serve children of color and other priority populations such as immigrants and refugees.

City of Portland
Requested Budget Equity Report

PCL has focused its effort on implementing the recommendations of the PSU study, and incorporating the recommendations of the community engagement report in the funding applications issued in September 2019. Links to these documents are below and have been described in more detail above.

Portland State University, Center for Improvement of Child and Family Services: The Portland Children's Levy: Review of the Grantmaking Process, January, 2019. <http://www.portlandchildrenslevy.org/sites/default/files/PSU.Grantmaking%20Process%20Improvement.%20Final%20Report.01.30.19.pdf>

Empress Rules Equity Consulting: Portland Children's Levy Community Engagement Report, April 2019. <http://www.portlandchildrenslevy.org/sites/default/files/documents/Portland%20Children%27s%20Levy%20Report.pdf>

Program Area Strategies, 2020-2025, adopted by Allocation Committee, June 2019. http://www.portlandchildrenslevy.org/sites/default/files/PCL%20Program%20Area%20Strategies%202020-19.FINAL_.06.24.19_0.pdf

Racial Equity Plan Link:

Requested Budget Community Engagement:

City of Portland
Requested Budget Equity Report

Empress Rules Equity Consulting engaged community members and service providers around community needs, preferred services and methods of delivery, and barriers to access. PCL used their findings to create the funding applications for the current grant round. Empress Rules engaged 405 community members and 95 service providers through an online survey and conducted 8 focus groups with 85 community members. Community members who responded to the survey identified as follows:

- 15% youth; 85% adults
- 20% had a child with a disability; 11% reported having a disability
- 24% had been or were currently involved in the foster care system
- 19% identified as LGBTQ+
- 27% had experienced houselessness
- 67% were parents/caregivers
- 32% were immigrants/refugees
- 49% earned less than \$50,000 per year
- 48% primarily spoke a language other than English at home
- 71% identified as of color (Latinx, Black, African, Native Hawaiian or Pacific Islander, Asian, Slavic, Native/Indigenous, Middle Eastern)

Focus groups included 2 groups of youth and 6 with adult parents; people who are/were impacted by the foster system, people who are impacted by disabilities (adults or children), 2 Spanish speaking parent groups, and parents who identify as immigrants/refugees. Survey and focus group participants were provided with participation incentives in recognition of their time and input.

Base Budget Constraints:

As noted above, PCL has focused efforts on improving equity in grantmaking by changing the funding process, the funding application, level and type of community engagement and starting a small grants fund. A new staff position was added to the FY 2020 budget to manage implementation of the small grants fund, and a new staff member was hired in November 2019. PCL is subject to a 5% administrative cap under authorizing legislation and all staff costs are charged against this limit. With the additional costs for the Small Grants Manager and implementation of a small grants process, PCL administrative costs will be close to the administrative cap as it has been interpreted to date.

Notable Changes:

PCL is implementing a small grants fund based on recommendations from a PSU study evaluating grantmaking practices and processes. The fund is designed to improve equity of access by offering smaller grants to organizations arising out of diverse communities, serving children and families not served in PCL's larger grants, and building capacity of smaller organizations.

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Equity Manager Role in Budget Development

PCL does not have dedicated equity staff; all staff are required to focus on making funding processes and priorities equitable.

**Equity
Manager:**

**Contact
Phone:**

ADA Title II Transition Plan:

Not applicable.

Accommodations:

Capital Assets & Intergenerational Equity

PCL does not have capital assets.

Measure Title	PM 2017-18 Actuals	PM 2018-19 Actuals	PM 2019-20 YTD Actuals	PM 2019-20 Target	PM 2020-21 Target	Strategic Target
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PCL's methods for tracking data on funded programs are detailed in the attached document, Goals, Strategies and Accountability Metrics, 2014-2019. http://www.portlandchildrenslevy.org/sites/default/files/wysiwyg/PCL%20Goals%20Strategies%20Accountability.2014-2019.with%20Appendices_0.pdf

This document details how PCL collects information on who is served in funded programs (gender, race ethnicity, age, primary language spoken at home, residence or school zip code and family income), service goals (number served and level of service provided), whether youth/caregivers meet participation goals in the program, whether youth/caregivers meet program outcomes, and the level of staff turnover in the program. This data is monitored on an individual grant basis, and aggregated annually across all Levy programs, and by program area. PCL publishes the aggregated data annually. The 2018-19 report is currently being finalized and will be published in February 2020. A summary of Levy-wide aggregated data for 2018-19 is below. Please note that data below does not include hunger relief service recipients for reasons detailed in the report.

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**Data Tracking
Methodology:**

Demographics of Children Served:

Gender: 51.6% identified as girls; 44.7% identified as boys, .3% identified as transgender/genderqueer, and 3.3% did not report gender.

Age: Children aged 0-8 comprised 50.2% of the total service population in 2018-19. The high portion of young children served as compared to older youth reflects PCL's ongoing priority to invest early in a child's life to support positive development (33% of total funds were invested in early childhood services, and a significant portion of the 16% of funds invested in child abuse prevention/intervention and the 9% of funds invested in services for foster youth serve children aged 0-8).

Primary Language: 63.3% spoke English, 17.5% spoke Spanish, 12.6% spoke another language and 6.6% of children did not report data.

Disability: 4% of children and 11.5% of caregivers served had a disability.

Residence: 42% of children resided or went to school east of 82nd Ave in 2018-19; average of 44.4% over past five fiscal years.

Racial/Ethnic Identity: Data detailed above. Multiple identities of multi-racial/ethnic participants are detailed in the full report.

Family Income: 89.4% of children on whom this data was reported lived in families with an income at 185% or less of the federal poverty level; (FPL was \$25,100 in 2018 for family of 4). 38% of children served did not provide income data.

Service Data

Children Served: Grantees exceeded goals for numbers served by 14.2% (goal: 10,337; actual: 11,810).

Participation Data: 77.9% of program participants met participation goals in grant agreements. Participation goals are set based on the minimum level of service likely to produce the intended outcome of the service. Participation data disaggregated by race/ethnicity and compared to enrollment data disaggregated by race/ethnicity shows no significant disparity between the race/ethnicity of children enrolling in services, and children meeting participation goals. The largest disparity was for the Latinx population: 24.2% of population enrolled in PCL funded programs identified as Latinx and 23.2% of the population that met participation goals identified as Latinx.

Outcome Goals: Grantees met 82.2% of outcome goals in grant agreements. This measure compares number of goals met to total goals. The percentage of participants meeting specific goals is reported by program area where grantees measure similar goals (e.g. % of children meeting

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developmental milestones in early childhood programs; % of children/youth meeting youth development goals in after-school programs).
Staff Turnover: 16.9% of staff funded in whole or in part with PCL funds turned over during 2018-19.

Hiring, Retention, & Employment Outreach:

PCL transitioned to a separate administrative entity in late 2018 after previously being housed in a Commissioner's office. PCL submitted its first Affirmative Action Plan in 2019 which included strategies for diversification of its staff should additional positions be added, or current positions turn over, to continue staff education on diversity, equity and inclusion, and to consider how equity is included in performance evaluation. PCL currently has 7 staff members, 42% of whom are part-time employees. 86% of current staff identify as white, 14% identify as African American; 71% identify as female and 29% identify as male. PCL hired a new staff in November 2019 to implement the small grants fund. Outreach for the position was conducted in accordance with the Affirmative Action Plan, and a diverse pool of candidates applied. All three finalists for the position self-identified as a person of color, and two identified as speaking languages other than English. The hiring panel was composed of two PCL staff and three non-PCL staff; all non-PCL staff panel members identified as people of color. Five of seven PCL staff have been employed in their positions for more than 10 years and in the course of employment have taken regular trainings on diversity, equity and inclusion offered through the city (including Uniting to Understand Racism dialogues) and outside partners. Staff regularly attend the city/county diversity and equity conference, and recently participated in a year-long series on diversity, equity and inclusion offered by the Center for Equity and Inclusion designed to consider how the funding community operationalizes principles of equity in how and what they fund. In 2019, the majority of staff attended the city/county diversity conference, all PCL staff took at least one advanced equity training, three staff engaged in monthly anti-racism curriculum groups, and two staff have been trained on improving accessibility of public information to non-English speakers and people with hearing and visual disabilities. Equity goals were included in the annual goals for each employee's performance evaluation in 2019.

Contracting Opportunities

PCL prioritizes hiring D/M/W/ESB listed contractors for professional service needs such as quality assessment and improvement assistance/training for grantees, community engagement, evaluation expertise, independent financial audit, and communications (web site, design, annual community report). Of PCL's 6 current contracts for these types of services, 4 are with D/M/W/ESB entities, and 2 are with non-profit entities (Education NW, Oregon Community Health Workers Association). PCL also contracts with Volunteers of America, a non-profit entity, to cater food at trainings and other grantee meetings.

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Engaging Communities Most Impacted by Inequities

See response above detailing participants in community engagement process and resulting funding priorities.

The Small Grants Fund manager had begun outreach to small organizations providing services in PCL program areas that have not been funded by PCL in the past. PCL will host community conversations in February and March 2020 to provide information and gather input to shape the funding process design. Meetings will be held at two different community locations in North and East Portland. Over 50 organizations have been invited to the meetings, none of which have been funded by PCL in the past.

Empowering Communities Most Impacted by Inequities

PCL seeks to fund organizations that can demonstrate a strong commitment to racial equity, diversity and inclusion and that seek to empower communities most impacted by inequities (see funding criteria in application template attached). Organizations seeking funding must demonstrate that they use multiple methods on a regular basis across the organization to solicit service user feedback, such as focus groups, surveys, interviews and/or community advisory groups. Organizations must also demonstrate that services offered are based on clients' expressed needs, and address common barriers to access.