

ATTACHMENT D – Amended 5/13/2021

Budget Notes from Proposed Budget & Amended in Approved Budget

City Budget Office

Expiring Tax Increment Finance Districts and Returning Property Tax Revenue

The anticipated completion of 13 current Tax Increment Finance (TIF) Districts will result in increased resources returning to the assessment rolls and the City's General Fund, beginning in FY 2021-22. The City Economist has begun assuming these resources as part of the balanced five-year forecast. The City Economist and Debt Management are directed to provide an updated forecast of anticipated revenues over the next ten years and the relationship of those resources to projected expenditures under current service levels and General Fund commitments.

The City Budget Office and the Chief Administrative Officer are directed to provide this information to Council Offices and subsequently lead a work session to discuss potential investment options for any anticipated excess available resource.

Alternative Delivery Models for Medical Calls

Currently, seventy percent of Portland Fire & Rescue's calls for service are for medical calls, while thirty percent are for fires and other rescues. This suggests a misalignment between our community's needs and the City's current model, which must be addressed. To this end, I direct the Community Safety Transition Director to work with Portland Fire & Rescue, the Bureau of Emergency Communications, and the City Budget Office to issue a report to Council by December 31, 2021 that identifies alternative delivery models that would provide more appropriate response to medical calls for service. A critical consideration will be how alternative approaches enable the bureau to maintain or improve services for fire and other hazard-type calls. The report may consider revenue-generating activities, should reflect BOEC's adoption of ProQA (priority medical dispatch), and will inform the City's position on funding for contracted ambulance services.

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Analysis of Unarmed Response Program at the Police Bureau

Community Safety Officer – Public Safety Support Specialist – Program Evaluation

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responsibilities for community safety officers were negotiated between the City of Portland and the Portland Police Association, which represents these employees.

The Community Safety Transition Director, City Budget Office, and Police Bureau are directed to work together to propose a set of performance measures that will track outcomes of the program on an ongoing basis. The Police Bureau is also directed to provide an initial report on these measures by the end of calendar year 2021 in order to inform the budget development process for Fiscal Year 2022-23. This evaluation should include an analysis of day-to-day activities and outcomes of the program; a cost-benefit analysis of the program; and an assessment of the alignment of an expanded PS3 program and the current efforts to reimagine the City's approach to community safety. The report should include recommendations to maximize the community visibility and presence of these community safety officers; and to increase the volume of calls these employees take in order to free up as much patrol officer capacity as possible. The Police Bureau is further directed to establish the program as a program offer in its FY 2022-23 Requested Budget.

Auditor's Office

The Auditor's Independent Budget

The City Council commits to honoring the independence of the Auditor's budget. The Council must balance this commitment with the responsibility to manage constrained discretionary resources and significant demand for public services citywide. The Council has supported the creation of the Auditor's reserve fund which allows the Auditor to retain up to \$500,000 in unspent General Fund, providing budget flexibility and security that is not granted to any other bureau or elected office. Further, the Council commits that it will only seek to reduce the Auditor's General Fund allocation if the City's General Fund forecast require Citywide budget reductions in excess of \$6 million. Should the Council reduce the Auditor's budget, they will work with the Auditor's office to identify acceptable reductions and only reduce the Auditor's budget at a level commensurate with other General Fund bureaus. In cases where the Auditor has consented to new or expanded responsibilities, or when code or voter-approved changes dictate changes to Auditor's functions, Council will work with the Auditor to ensure the new scope of work is resourced and set up to be successful.

Independent Police Review

City Council commits to preserving the existing positions in Independent Police Review (IPR) as permanent, ongoing positions. Council acknowledges the importance of the positions and the expertise of the employees who hold them in meeting the terms of the City's settlement agreement with the U.S. Department of Justice. Council also acknowledges the employees' experience and commitment to government accountability are worth preserving as a benefit to the public beyond their current assignment.

The 14 positions will be assigned to civilian oversight of police in IPR through June 30, 2023, giving Council two fiscal years to implement a new voter-approved police oversight board. Thereafter, Council commits to finding equivalent positions upon transition, either within the Auditor's Office or elsewhere in the City.

Should Council and the Auditor determine the positions would be needed for up to one additional fiscal year to accommodate implementation of the new police oversight board, the Fiscal Year 2023-24 budget will reflect their continued service in that role, their new role in the City, or a combination of the two.

Portland Housing Bureau

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Prosper Portland

One-time Funding for the Old Town Community Development Director

In 2019, City Council approved a five-year action extension to the Old Town Chinatown Action Plan, which indicated a commitment from the Old Town Community Association to support the District manager position from FY 2021-22 through FY 2024-25. However, due to the economic impacts of the COVID-19 pandemic, these businesses cannot support the director in FY 2021-22, and the City is providing \$60,000 as bridge funding for the year. The funds are allocated with the understanding that the funding commitment is for one year only and the Old Town Community Association shall be responsible for fully supporting the position in future years as indicated in the Old Town Chinatown Action Plan.

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Office of Management & Finance

Enhanced Service District Community Engagement & Coordination

Council directs the Chief Administrative Officer (CAO) to hire a Coordinator and to meaningfully engage the community about services provided by Enhanced Service Districts and the impacts districts have on the community, establish clear equitable criteria for the development and oversight of districts, provide oversight and policy recommendations in line with the City's Core Values. Additionally, the CAO will perform a comprehensive review of the districts and report back to council on results of the review and the engagement process. The information will be incorporated into any district agreements.

The deliverables will be:

- an engagement process that includes the people, businesses and organizations that are most affected by the districts.
- clear criteria for development of future and oversight program of existing districts
- a comprehensive response to Audit 529 Enhances Services Districts: City provides little oversight of privately funded public services.

The CAO shall present recommendations to Council prior to any ESD contract coming before council for renewal.

CityFleet Kerby Garage Relocation Proposal

Kerby Garage is functionally obsolete due to the poor condition of the facility. It is unable to be upgraded to accommodate green fleet requirements, it is located in a landslide zone and thus unable to fulfill its resilience obligations, and has a layout that precludes the provision of efficient service to the bureaus. This results in the routine waste of City resources due to service delays and disruptions in operations. Recognizing these long-standing deficiencies, OMF is directed to prepare a proposal in FY 2021-22 to relocate CityFleet for Council's consideration in the FY 2022-23 budget process. The proposal will include an evaluation of options, recommendations, cost estimates, and funding plan.

Equitable Recruitment, Retention, and Promotion of African American and Black Employees

In October 2020 the City African American Network (CAAN) released the results and recommendations of a survey they conducted, which showed many personal accounts of discrimination, job security fears, and a consistent want for more black leadership. In March 2021 CAAN followed this up with a report on City of Portland Black Workforce Data, daylighting the disparities in both hiring and retention of African American and Black employees, and highlighting the successes of investing in Black advancement in the Diverse Empowered Employees of Portland hosted Leadership Development Program.

This budget note directs the scheduling of a work session to make space for CAAN to present the findings of their reports and discuss with Council a partnership with the Bureau of Human Resources on the implementation of their recommendations from their March 2021 report. The Bureau of Human Resources, with the City's core values as the foundation and in shared

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accountability with City Bureaus and representatives from CAAN, shall then co-create a proposal for a program promoting equitable recruitment, retention, and promotion of African American/Black employees across the City of Portland through robust changes in current hiring practices, mentorship programs, affinity spaces, and mental health support. The proposal shall also address pay equity of African American/Black employees in support of Oregon's Equal Pay Act and be informed through collaboration with CAAN to create safe, equitable space for employees. The BHR Director and representatives from CAAN shall present this proposal and the additional resources required to implement changes to City Council in a work session no later than September 30, 2021.

Citywide Anti-white Supremacy Training

In October 2020 City Council participated in anti-white supremacy training with the Western States Center and committed to bringing anti-white supremacy training to all employees at the City of Portland. The Office of Equity and Human Rights has begun incorporating anti-white supremacy concepts into its Equity 101 trainings, as well as through the Racial Equity Results Based Accountability Framework as initial first steps, but we need to do more.

The Office of Equity and Human Rights is directed to partner with the Office of Commissioner Hardesty on a Request for Proposals for citywide anti-white supremacy training and come to Council in the Fall BMP with an update and request for resources.

Bargaining in good faith with labor partners

The City acknowledges its duty to bargain in good faith over wages, including Cost of Living Adjustments (COLA). The City further acknowledges its requirement to maintain the status quo for step increases during bargaining.

Options for Employee Wages and Benefits in FY 2021-22

In order to address the resource gap in FY 2021-22, the Proposed Budget does not include COLA or Merit for non-represented employees or COLA and Step increases for open contracts, subject to good faith bargaining and status quo obligations.

This budget note directs the Bureau of Human Resources to investigate options for offering non-represented employees and employees with open contracts other wage and benefit options in the FY 2021-22 Budget. This report will be presented to Council in Executive Session on or before September 15, 2021.

Program Evaluation of Portland Street Response

In February of 2021 the Portland Street Response pilot launched, and in May of 2021 Portland Street Response formalized an agreement with Portland State University's Homelessness and Research Action Collaborative for Program Evaluation Services. This agreement includes the provision of two reports to Council – one after 6 months, and one after 12 months of program implementation and data collection.

This budget note directs Portland Street Response to schedule a work session for the City Council after the six- and twelve-month marks of the program in collaboration with the

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Community Safety Transition Director. Each work session should include reporting about the pilot's performance against key metrics including impact on workload for Fire and Police bureau staff and number and type of calls responded to; and recommendations on how to improve the program, based on evaluation findings.

To ensure the evaluation is conducted under an appropriate study of call demand, response performance, and program outcomes while continuing to focus on one neighborhood (Lents) through March 2022, Portland Street Response (PSR) is directed to work with the Bureau of Emergency Communications and the Portland Police Bureau (PPB) to expand the call criteria addressed by the pilot, including the possibility of responding to housed individuals. Additionally, the Police Bureau shall seek all opportunities to shift calls for service involving mental health to Portland Street Response, while continuing to acknowledge and document the risks and benefits of the new policies. Finally, the Community Safety Transition Director shall work with Portland Fire & Rescue to perform a cost benefit analysis of the program and propose any new revenue options that become available by March 2022.

Analysis of Unarmed Response Program at the Police Bureau

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Prioritization of Office 365 implementation at the Police Bureau

To ensure timely and successful compliance with the Department of Justice settlement which is a prerequisite to the City's ability to begin critical community safety transition work, the Council

directs that implementation of Office 365 in the Police Bureau be prioritized by the Bureau of Technology Services and the Police Bureau.

Alternative Delivery Models for Medical Calls

Currently, seventy percent of Portland Fire & Rescue's calls for service are for medical calls, while thirty percent are for fires and other rescues. This suggests a misalignment between our community's needs and the City's current model, which must be addressed. To this end, I direct the Community Safety Transition Director to work with Portland Fire & Rescue, the Bureau of Emergency Communications, and the City Budget Office to issue a report to Council by December 31, 2021 that identifies alternative delivery models that would provide more appropriate response to medical calls for service. A critical consideration will be how alternative approaches enable the bureau to maintain or improve services for fire and other hazard-type calls. The report may consider revenue-generating activities, should reflect BOEC's adoption of ProQA (priority medical dispatch), and will inform the City's position on funding for contracted ambulance services.

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Coordination with Community Based Organizations and the City

On April 7, 2021 Council unanimously passed Ordinance 190355 to work in partnership with Community Based Organizations to reduce the impact of gun violence in our community. That ordinance outlined a number of steps the City must take to transform our Community Safety system and this budget note seeks to provide further direction, in alignment with the intent of the original ordinance.

The Community Safety Director and Office of Violence Prevention are directed to co-create an agreement with the Community Based Organizations they contract with on safety protocols. The co-creation of these protocols will ensure that our Community Partners and the Police Bureau will have clear protocols, and that Community Partners will know what the safety protocols are, and why they are being asked to show up at the request of the Police Bureau.

The Community Safety Director is directed to advise on the appropriate operational protocols for how the Office of Violence Prevention and Police Bureau will engage with Community Based Organizations.

The Community Safety Director is directed to provide an update to Council by November 1, 2021.

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Bureau of Development Services

Sustaining Development Services Capacity to Promote Economic Recovery

The pandemic is significantly impacting development services revenue, forcing a reduction in critical services that are foundational to stimulating Portland's recovery from crisis. City Council directs the Office of Management and Finance, Bureau of Revenue and Financial Services (BRFS) to earmark \$8.3 million in second tranche federal stimulus ARPA resources to prevent immediate layoffs, delay potential layoffs, and sustain current service levels within the Bureau of Development Services. Upon receipt of second tranche resources in the Spring of 2022, BRFS shall review the Bureau of Development Services' updated five-year financial forecast. If the forecast remains the same or worse than the five-year forecast presented during FY 2021-22 budget development, \$8.3 million in ARPA resources shall be allocated to backfill bureau revenue loss as eligible under Treasury guidance. If the Development Services forecast has improved from its current 2021 state and the bureau is not proposing layoffs during FY 2022-23 budget development, Council may choose to allocate up to \$8.3 million in ARPA resources in consideration of other priority needs for the federal resources. If the actual revenue collections are significantly lower than the forecast presented during FY 2021-22 budget development or the updated forecast is significantly worse, the bureau may proceed with layoffs at any time prior to the receipt of the \$8.3 million.

BDS Equity Program Community Engagement Position

This budget includes one-time General Fund resources to support a community engagement specialist position within the Bureau of Development Services. This position will join the bureau's Equity and Policy development team, leading community engagement efforts with the goal of ensuring the bureau's programs and services meet the needs of Black people, Indigenous people, people of color and people with disabilities. General Fund resources are being provided on a one-time basis for this important work given that the bureau is undergoing significant financial strain as a result of the economic impacts of the COVID-19 crisis. To ensure sustainability of this work in future years, the bureau is directed to prioritize internal resources towards this effort as part of its core operations. Additional General Fund subsidies for the Bureau of Development Services may be considered in the future to solve for continued financial challenges; however, work that is deemed essential to providing equitable services should be prioritized within bureau base resources.

Portland Police Bureau

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Sergeant Staffing at Bureau of Emergency Communications

The program to staff sergeants at BOEC 9-1-1 to support call triage has proven effective in helping to resolve or otherwise redirect low-priority calls for service that do not require a police response, freeing up patrol officer time for higher-priority calls. Efforts are underway to expand the City's 311 program to better respond to non-emergency calls for service, as well as to acquire updated call triage software (ProQA) for calls to the police; the Police Bureau is directed to continue staffing the BOEC triage program on straight-time, within existing resources, until these initiatives are complete.

Elimination of Unsupported Vacant Positions

As a result of position eliminations in the FY 2020-21 Adopted Budget, the Police Bureau eliminated all then-vacant sworn positions in Summer 2020. Since that time, the Police Bureau experienced significant additional attrition, with over 100 sworn employees and 25 professional staff retiring or otherwise separating from the bureau during FY 2020-21. Some of these vacant positions are budgetarily unsupported as part of the FY 2021-22 Adopted Budget. In order to enhance transparency around the Police Bureau's staffing and personnel expenditures, Council directs the Police Bureau to develop a plan to eliminate any vacant positions that are unsupported under the FY 2021-22 Adopted Budget. The Police Bureau is directed to develop this plan in time for the FY 2021-22 Fall Budget Monitoring Process (BMP), in order to abolish unsupported positions prior to the development of FY 2022-23 requested budgets.

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Resources for accelerated hiring at the Portland Police Bureau

In the proposed budget, the Mayor included onetime funding in the amount of \$5,264,000 across two fiscal years for the accelerated hiring of 30 Police Officers in the Portland Police Bureau. The Portland Police Bureau is directed to use this funding only for the personnel costs related to 30 new Police Officer hires, and no other bureau expenses. At the end of two fiscal years, any unused funds will be returned to the General Fund.

Portland Fire & Rescue

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Office of the City Attorney

Protocols for Reporting on the Status of the Settlement Agreement with the Department of Justice

The Office of the City Attorney is directed to share draft DOJ reports with Council members or their designee and the Mayor at least seven days in advance of their deadline for submission. In addition, the City Attorney is directed to facilitate direct communication between the DOJ and City Council on a quarterly basis to ensure progress towards substantial compliance with the agreement. Finally, the Office is directed to develop a protocol for resolution in the event that Council and the Portland Police Bureau are not in alignment on the drafted quarterly reports to the DOJ.

Special Appropriations

Coordination with Community Based Organizations and the City

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Portland Bureau of Transportation

Investigation of Alternative Revenue Sources

Council recognizes that the Portland Bureau of Transportation faces serious financial challenges as existing revenue sources are not sufficient to maintain service levels in future years or address the bureau's asset maintenance needs. Furthermore, existing revenue sources are dependent on fossil fuel consumption which is in direct conflict with our climate action goal of reducing carbon emissions by 40% before 2030. As the City implements initiatives to reach its climate action goals, the bureau will see a corresponding reduction in resources necessary to fund these initiatives. To ensure fiscal resiliency of the bureau moving forward, Council directs the Portland Bureau of Transportation to work with various stakeholders to develop new revenue sources that reflect the City's policy goals, address the bureau's structural deficit, and provide maximum fungibility to invest in our transportation system. The bureau shall present its recommended revenue proposals to Council during the FY 2022-23 budget development process.