




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

Commissioner in Charge:
Ted Wheeler, Mayor

Bureau Director:
Dr. Markisha Webster



To: Jessica Kinard
Director, City Budget Office

From: Dr. Markisha Webster 
Director, Office of Equity and Human Rights

Re: FY 2021-22 Fall Budget Monitoring Process

Date: September 9, 2021

The Office of Equity and Human Rights is pleased to submit its Fall Budget Monitoring Process (BMP) report. It contains a set of budget amendment requests which are either technical adjustments or which appropriate new internal revenue, but which do not represent changes to programmatic priorities. It also contains prior year fund reconciliation report, status updates on the set of prior year decision package, and a prior year performance measure report.

Should you have any questions relating to the Office of Equity and Human Rights' BMP submittal, please contact me at 503-823-4433.

In compliance with Civil Rights laws, it is the policy of the City of Portland that no person shall be excluded from participation in, denied the benefits of, or be subjected to discrimination in any City program, service, or activity on the grounds of race, color, national origin, or disability. To request accommodations, translation and/or interpretation, to file complaints, or for additional information or services, please contact us at 503-823-4433, City TTY 503-823-6868, or Oregon Relay Service: 711.

OE - Office of Equity & Human Rights DP Type New Revenue

Request Name: 12630 -Inter-Bureau Services

Package Description

The Office of Equity and Human Rights provides professional and technical assistance to other City bureaus. This package increases internal resources to meet requirements for two particular sets of services.

This package establishes a \$30,000 interagency transfer from the Mayor's Office to OEHR to cover personnel cost for Director Webster's role as a special advisor to the Mayor on issues of racial justice and equity.

This package also establishes a \$4,605 interagency transfer from the Water Bureau which will reimburse OEHR for equity-focused consultation in collaboration with the Bureau of Environmental Services, the Portland Utility Board, and community partners, in which PWB will design a debt relief program to help the most vulnerable Portlanders catch up on overdue bills. This is funded with federal resources from the American Rescue Plan Act grant.

Service Impacts

Director Webster will serve as special advisor to the Mayor regarding racial justice and equity issues. An OEHR analyst will consult with Water, Environmental Services, the Portland Utility Board and community partners to establish equitable access and outreach to provide debt-relief resources to vulnerable members of the community with overdue utility bills.

Equity Impacts

Director Webster's advice to the Mayor regarding racial justice and equity issues is intended to improve the equity of outcomes. The consultation of the OEHR analyst on the utility bill debt relief program is intended to enhance the equitability of access and outreach.

2021-22 FALL Requested Adj		
Expense	Personnel	34,605
Expense	Sum:	\$34,605

2021-22 FALL Requested Adj		
Revenue	Interagency Revenue	34,605
Revenue	Sum:	\$34,605

OE - Office of Equity & Human Rights DP Type Technical Adjustments

Request Name: 12632 -OEHR Technical Adjustments

Package Description

This package contains technical adjustments that transfer appropriation between major object categories and do have material programmatic impact. The Diverse Empowered Employee Program includes a one-time appropriation of \$50,000 to support work within the City African American Network. This package includes a transfer of a portion of that funding from external materials and services to the personnel services category to cover staff time.

Service Impacts

The transfer of DEEP CAAN resources will allow it to absorb the cost of work performed by other bureaus' employees for time devoted to work on this project.

Equity Impacts

The work involved in the DEEP CAAN program is intended to promote equity and racial justice.

2021-22 FALL Requested Adj		
Expense	External Materials and Services	-22,000
	Personnel	22,000
Expense	Sum:	\$0

Prior Year Fund Reconciliation Report

Office of Equity & Human Rights

100 - General Fund

EXPENDITURES	2020-21 Revised Budget	2020-21 Actuals	Percent of Actuals to Revised
Personnel	2,294,104	1,712,909	74.67%
External Materials and Services	311,551	74,070	23.77%
Internal Materials and Services	289,157	264,973	91.64%
TOTAL EXPENDITURES	2,894,812	2,051,952	70.88%

REVENUES	2020-21 Revised Budget	2020-21 Actuals	Percent of Actuals to Revised
Charges for Services	5,000	764	15.28%
General Fund Discretionary	1,699,218	0	0%
Interagency Revenue	88,630	88,593	99.96%
General Fund Overhead	1,101,964	0	0%
TOTAL REVENUES	2,894,812	89,357	3.09%

Expenditure Discussion

There was a substantial amount of underspending in the personnel services category, which was due to a significant number of vacancies. These were largely related to newly-created positions, most established in the FY 2020-21 Fall BMP. There is typically a delay between the time a position is established and when it is filled. Just over half of the personnel budget surplus was related to unspent Fall BMP packages.

External materials and services expenditures were under budget across several programs, with Fall BMP decision packages accounting for 103% of the surplus. These were in part tied to disruptions related to OEHR's short-term pivot in focus to pandemic response, which also impacted hiring into the newly-created positions in the programs associated with those decision packages.

The personnel services and the external materials and services expense surpluses associated with the Fall BMP decision packages were backed by ongoing General Fund resources.

Revenue Discussion

The preponderance of the Office of Equity & Human Rights (OEHR) resources are either General Fund Discretionary, General Fund Overhead, or internal revenue from other City bureaus. There was no material discrepancy in external revenue.

Other Notes

Bureau Performance Narrative

Office of Equity & Human Rights

The City's response to the pandemic changed many of its service delivery priorities. OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, and other bureaus were similarly impacted, which would likely have influenced achievement on several performance measures. This is particularly the case with measures related to services provided to other bureaus that would have been disrupted by these events.

Key Performance Measures	Measure Type Name	FY 2018-19 Actuals	FY 2019-20 Actuals	FY 2020-21 Target	FY 2020-21 Actuals	FY 2021-22 Target	Strategic Target	Details
OE_0028 Percentage of City management that are employees of color	OUTCOME	25%	23%	25%	22%	25%	28%	
OE_0034 Percentage of ADA Title II Transition Plan barriers removed by City bureaus each year	OUTCOME	90%	N/A	90%	N/A	90%	100%	Data unavailable. OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which would likely have influenced achievement on this measure.
OE_0040 # of Equity 101 training sessions offered annually	WORKLOAD	47	30	45	20	50	60	OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which influenced achievement on this measure.

Other Performance Measures	Measure Type Name	FY 2018-19 Actuals	FY 2019-20 Actuals	FY 2020-21 Target	FY 2020-21 Actuals	FY 2021-22 Target	Strategic Target	Details
OE_0012 Number of City employees who received equity trainings annually	WORKLOAD	423	613	500	397	600	5,682	OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which influenced achievement on this measure.

Office of Equity & Human Rights

Prior Year Performance Reporting

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Other Performance Measures	Measure Type Name	FY 2018-19 Actuals	FY 2019-20 Actuals	FY 2020-21 Target	FY 2020-21 Actuals	FY 2021-22 Target	Strategic Target	Details
OE_0019 Number of requests to PCOD for advice, consultation, or technical assistance by City bureaus or elected officials	WORKLOAD	20	N/A	10	N/A	N/A	10	Data unavailable. OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which would likely have influenced achievement on this measure.
OE_0021 Number of HRC advisements, consultations, or technical assistance provided to City bureaus and elected officials offices	OUTPUT	19	3	10	N/A	N/A	N/A	Data unavailable. OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which would likely have influenced achievement on this measure.
OE_0023 Number of bureau consultations regarding Title II / Title VI	WORKLOAD	215	176	150	86	150	150	OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which influenced achievement on this measure.
OE_0025 Number of requests by City bureaus or elected officials for equity consultation or technical assistance	WORKLOAD	60	160	60	70	160	200	OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which influenced achievement on this measure.
OE_0027 Percentage of City workforce that are employees of color	OUTCOME	35%	27%	27%	24%	27%	30%	

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Other Performance Measures	Measure Type Name	FY 2018-19 Actuals	FY 2019-20 Actuals	FY 2020-21 Target	FY 2020-21 Actuals	FY 2021-22 Target	Strategic Target	Details
OE_0037	Number of participants who engaged in BMA sponsored/hosted activities or programs	500	1,800	2,500	N/A	3,000	1,500	Data unavailable. OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which would likely have influenced achievement on this measure.
OE_0039	Number of bureau consultations regarding the Language Access Program	48	47	40	55	50	50	OEHR's focus turned outward to assist in the recovery response to vulnerable Portlanders, other bureaus were similarly impacted, which influenced achievement on this measure.

<p>This code is a unique identifier for each individual measure. The first two letters denote the bureau data owner of that measure.</p> <p>This is a short name used to refer to the measure within the system when a longer title is infeasible. It is not used for publishing purposes.</p>	<p>This is a brief (1-2 sentences) description of the outcomes for this performance measure. Explain apparent trends; compare to fiscal year and/or strategic targets. This is published on the performance dashboard for all measures.</p> <p>This is the published title of the performance measure.</p>	<p>This indicates the accuracy and reliability of the data. High: data gathered by dependable processes and validated. Low: data gathered without dependable process, without validation, or without reliable method of quality assurance.</p> <p>This denotes whether or not this measure should be published in the budget document.</p> <p>Indicates the desired trend for this measure.</p>
	<p>These fields can be updated in BFM-->Performance Mngmt-->Performance Measure Dimension-->Attributes Tab</p>	<p>These fields can be updated in BFM-->Performance Mngmt-->Performance Measure Dimension-->Attributes Tab</p>
<p>Performance Measure Cd</p>	<p>Performance Measure Name</p>	<p>Measure Title</p> <p>Graph Description</p> <p>Disaggregated Data</p> <p>Demographic</p> <p>Geographic</p> <p>Publish Measure</p> <p>Desired Direction</p> <p>Reliability</p>
OE_0012	# of City employees received equity trainings	Number of City eCity Council esta 0 0 0 YES NONE NA
OE_0019	# of issues on which PCOD provided consultation,	Number of requèNA 0 0 0 YES UP NA
OE_0021	Number of policy consultations by HRC	Number of HRC NA 0 0 0 YES UP NA
OE_0023	# bureau consultations regarding Title II / Titl	Number of bureèNA 0 0 0 YES NONE NA
OE_0025	# bureau consultations regarding equity	Number of requèNA 0 0 0 YES UP NA
OE_0027	% City workforce that are employees of color	Percentage of CiNA 0 0 0 YES UP HIGH
OE_0028	% City management that are employees of color	Percentage of CiOEHR has almo 0 0 0 YES UP MEDIUM

This should only be used for OMF divisions. This does not in anyway affect any other report other than OMF performance measures	This indicates the accuracy and reliability of the data. High: data gathered by dependable processes and validated. Low: data gathered without dependable process, without validation, or without reliable method of quality assurance.	Check the box if this measure is a Key Performance Measure. All measures should either be assigned "YES" or "NO."	This indicates how often the component variables of the measure are collected (options include transactional, weekly, monthly, quarterly, or intermittently).	This indicates whether this measure is a workload, output, outcome, or efficiency.	Aggregation is required to be selected when creating a new measure. "1" indicates that the measure can be summed across all accounting periods. "2" indicates the average of the data in the accounting periods should be taken.	For measures to be graphed in the budget document, enter a unit of measurement to be displayed on the Y-axis of the graph.	Mathematical equation used to calculate the measure.	This indicates the year that the bureau expects to achieve the strategic target (enter 4-digit year). For fiscal years, enter the year in which the FY ends.	Cite the Citywide, bureau, or state/regional strategic plan referenced in the creation of the strategic target.	This describes how data is collected for this measure. Include data collection methods (survey forms, printed reports), data sources (manual logs, check sheets, databases) collection time frame, and data storage location.	First and last name of the person overseeing the program reflected by the measure. Reported as "Bureau data source program manager" on performance dashboard.	Email address of City employee overseeing the bureau program or operations reflected by the measure.
Performance Mngmt-->Performance Measure Dimension-->Groups Tab. Please use the magnifying glass and select from the available options						These fields can be updated in BFM-->Performance Mngmt-->Performance Measure Dimension						
Division	Datatype	KPM	Frequency	Measure Type	Aggregation	Unit of Measure	Formula	Target Year	Strategic Plan	Collection Method	Program Mgr	Program Mgr E-Mail
0	NO	NO	TRANSACT	WORKLOAD	1	# City Employee (blank)		2019	Citywide Racial	NA	Koffi Dessou	Koffi.Dessou@p Koffi
0	NO	NO	NA	WORKLOAD	1	NA	(blank)	NA	(blank)	NA	Jonathan Simeo	Jonathan.Simeo Jona
0	NO	NO	NA	OUTPUT	1	NA	(blank)	NA	(blank)	NA	Tatiana Elejalde	Tatiana.Elejalde Tatia
0	NO	NO	NA	WORKLOAD	1	NA	(blank)	NA	(blank)	NA	Danielle Brooks	Danielle.Brooks Dani
0	NO	NO	NA	WORKLOAD	1	NA	(blank)	NA	(blank)	NA	Judith Mowry	Judith.Mowry@p Judit
6	NO	NO	QUARTERLY	OUTCOME	1	Percent of City E	Number of City e	NA	(blank)	Data extracted fr	Koffi Dessou	Koffi.Dessou@p Matt
6	YES	NO	QUARTERLY	OUTCOME	1	Percentage	City managers o	2017	Citywide Racial	Data extracted fr	Koffi Dessou	Koffi.Dessou@p Matt

<p>First and last name of the City employee responsible for collecting and reporting the data for this specific measure. Reported as Bureau "Data source contact" in the Performance Measure methodology appendix.</p> <p>Email address of the City employee responsible for collecting and reporting the data for this specific measure.</p> <p>Relevant URL, "for more info" to direct reader to program webpages, press releases, how to get involved, annual report, budget, or bureau home page.</p> <p>This field provides both bureaus and CBO a place to document additional details about the measure that do not fit elsewhere.</p>									
Dimension-->Description Tab	Contact your CBO analyst to update this	Contact your CBO analyst to update this		Update this in Form 1800	Update this in Form 1800	Update this in Form 1800			
Data Contact	Data Contact E-Mail	URL	Notes	FY 2018-19 Actuals	FY 2019-20 Actuals	FY 2020-21 Target	FY 2020-21 Actuals	FY 2021-22 Target	Strategic Target
Dessou	Koffi.Dessou@p (blank)			423	613	500	397	600	5,682
Jonathan Simeo	Jonathan.Simeo@p	https://www.portland.gov		20	N/A	10	N/A	N/A	10
Tatiana Elejalde	Tatiana.Elejalde@p	https://www.portland.gov		19	3	10	N/A	N/A	N/A
Danielle Brooks	Danielle.Brooks@p	https://www.portland.gov		215	176	150	86	150	150
Judith Mowry	Judith.Mowry@p (blank)			60	160	60	70	160	200
Matt Lim	Matt.Lim@portland.gov	http://www.portland.gov		35%	27%	27%	24%	27%	30%
Matt Lim	Matt.Lim@portland.gov	http://www.portland.gov		25%	23%	25%	22%	25%	28%

OE_0034	% of ADA barriers removed each year	Percentage of A NA	0	0	0 YES	UP	MEDIUM
OE_0037	Number participants engaged in BMA activities	Number of particNA	0	0	0 YES	UP	NA
OE_0039	Number of bureau consultations on LAP	Number of bureæNA	0	0	0 YES	NA	NA
OE_0040	# of Equity 101 training sessions annually	# of Equity 101 t	0	0	0 YES	NONE	HIGH

elle Brooks	Danielle.Brooks	http://www.portla	90%	N/A	90%	N/A	90%	100%
Robbins	Condry.Robbins	(blank)	500	1,800	2,500	N/A	3,000	1,500
ina Elejalde	Tatiana.Elejalde	(blank)	48	47	40	55	50	50
			47	30	45	20	50	60
