

Portland Children's Levy  
FY 2022-23  
Requested Budget



Office of Commissioner Dan Ryan  
City of Portland

**MEMORANDUM**

January 26, 2022

To: City Budget Office  
Mayor Ted Wheeler  
Commissioner Jo Ann Hardesty  
Commissioner Mingus Mapps  
Commissioner Carmen Rubio  
Auditor Mary Hull Caballero

From: Commissioner Dan Ryan 

Subject: FY 2022-23 Requested Budget of the Portland Children's Levy

I am pleased to submit the FY 2022-23 requested budget of the Portland Children's Levy (PCL) for your consideration. PCL is funded by a five-year property tax levy and is projected to generate \$23.2 million in FY 2022-23. There are no decision packages in this budget request.

This budget will support 52 community-based organizations and 92 service programs working toward PCL's goals to prepare children for school, support children's success inside and outside of school and eliminate racial and ethnic disparities in children's well-being and school success. Over 10,000 children will receive hunger-relief services and over 8,000 children will be supported by PCL's investments in early childhood, child abuse prevention and intervention, foster youth, after-school and mentoring services.

PCL's commitment to Portland's children, Council's priorities and the City's racial equity goals are reflected in the organizations we support and the populations we help serve. Programs funded through the Portland Children's Levy have consistently served 65-70% children who identify as Black, Indigenous or people of color (BIPOC); in 2020-21, programs able to collect and report data during the pandemic reported 80% of the children served identified as BIPOC. And 44% of these children lived or went to school East of 82<sup>nd</sup> Avenue; 94% lived in families with incomes equal or lower than 185% of the Federal Poverty Level.

Our grantees reflect the racial and ethnic identities of the populations they serve and have a proven record of effectively engaging and serving BIPOC and their families. Data has consistently shown that BIPOC participants meet program participation goals in the same



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proportion as they enroll in programming, indicating that programs successfully keep BIPOC participants engaged over time.

In 2020-21, participants in PCL-funded programs met a wide range of outcome goals including the following:

- **Early Childhood:** 87% of children were on track with developmental milestones; 89% of children not meeting milestones were referred for additional services; and 93% of parents demonstrated or improved positive parenting practices.
- **Child Abuse Prevention/Intervention:** 87% of parents demonstrated or improved positive parenting practices; 85% of parents reported increased stability and safety in their parenting relationships. 79% of children were on track with developmental milestones; and 90% of children met therapeutic intervention outcomes.
- **Foster Care:** 69% of children and youth met academic outcomes and 76% of children and youth met permanency outcomes.
- **After School:** 88% of children and youth met positive development outcomes (such as positive cultural identification, engagement, belonging, positive attitude toward school and self-confidence).
- **Mentoring:** 92% of youth met outcomes for positive engagement in school.
- **Hunger Relief:** Programs collectively exceeded annual goals for people served by more than 100% - due to increased demand during the pandemic.

The Portland Children's Levy was overwhelmingly renewed in May 2018 by 83% of voters through June 2024. As such, the budget request before you is defined by language in the ballot and the will of the voters. We will expend and manage up to \$27.5 million in program grants, including funds for training and technical assistance for our partners. Meanwhile, our costs for operations will remain less than 5% of the total fund - as mandated in the levy language.

PCL's requested budget will allow for continued support and investment of community-based organizations serving primarily low income and BIPOC children and families. In partnership with our community grantees, we aim to deliver on behalf of the generous voters who continue to support innovation to improve the lives for our city's greatest resource: our children and youth. I urge Council to support this request.



January 26, 2022

Re: Portland Children's Levy Budget Advisory Committee

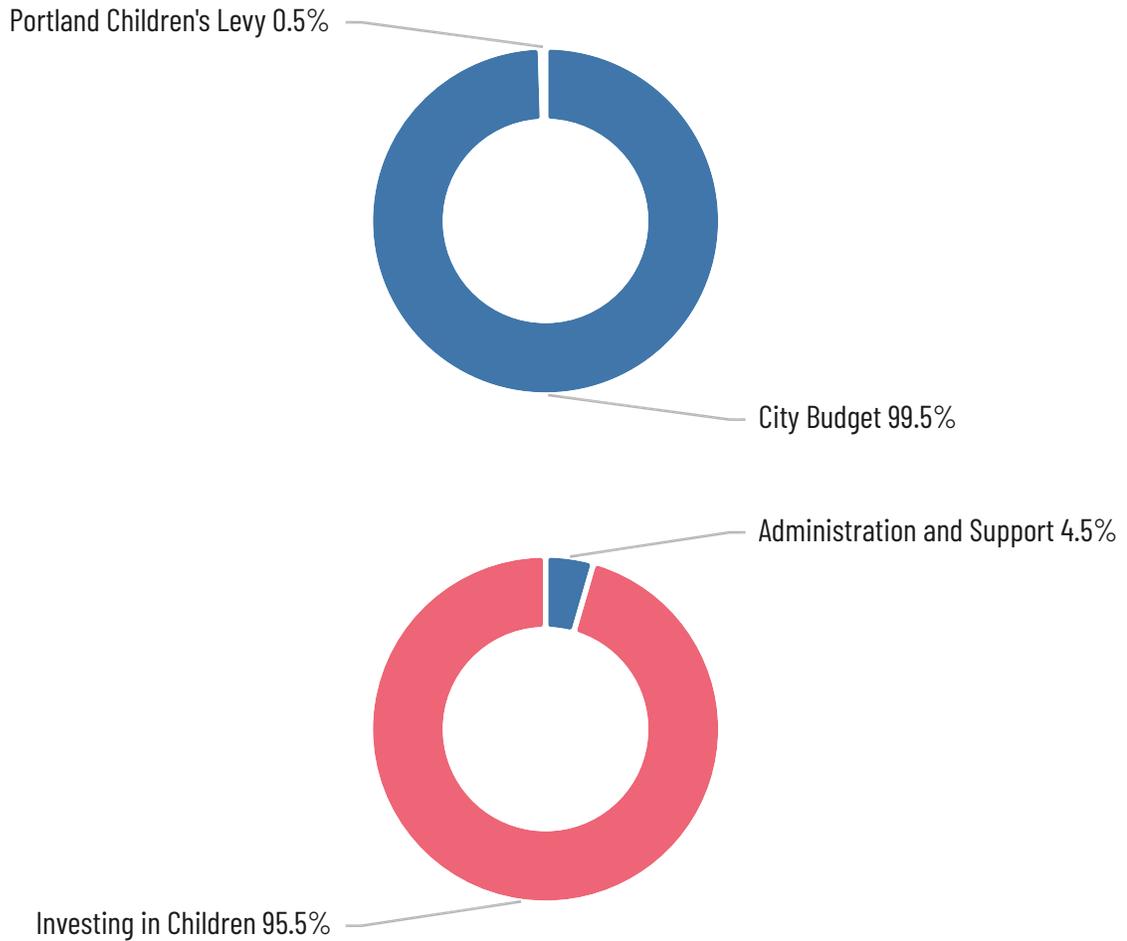
The Children's Levy Allocation Committee serves as its Budget Advisory Committee. Current members of the Allocation Committee are:

- City Commissioner Dan Ryan
- County Commissioner Jessica Vega Pederson
- Traci Rossi – City appointed citizen member
- Felicia Tripp-Folsom – County appointed citizen member
- Mitch Hornecker – city appointed member from business community

The Allocation Committee makes grant funding recommendations for the Children's Levy. The Allocation Committee recommended funding of 84 3-year large grants totaling \$68.4 million which began on July 1, 2020. The Allocation Committee recommended 8 3-year small grants totaling \$1 million, 7 of which began on January 1, 2021; one grantee chose not to accept the grant award. The funding recommendations of the Allocation Committee were approved by Portland City Council.

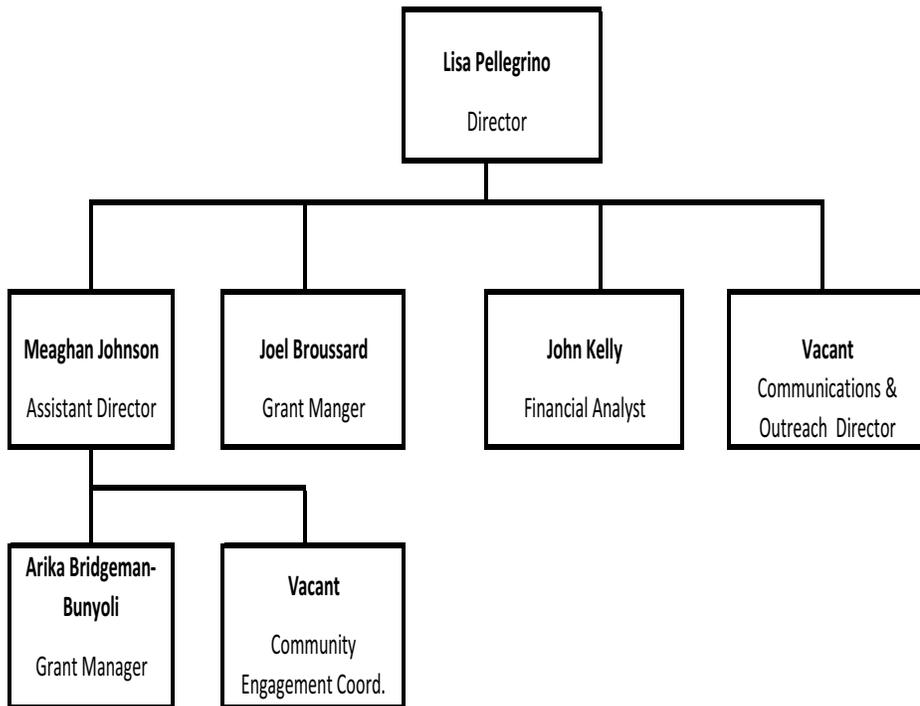
Administrative expenditures of the Portland Children's Levy are capped at 5% of the fund by the authorizing legislation. The Children's Levy is audited annually to ensure compliance with authorizing legislation.

## Portland Children's Levy



### Bureau Overview

Requirements	Revised FY 2021-22	Requested Total FY 2022-23	Change from Prior Year	Percent Change
Operating	\$30,878,316	\$32,428,706	\$1,550,390	5%
Capital				
<b>Total</b>	<b>\$30,878,316</b>	<b>\$32,428,706</b>	<b>\$1,550,390</b>	<b>5%</b>
Authorized Positions	5.90	6.70	0.80	13.56%



## Portland Children's Levy

<b>Bureau Mission</b>	<p>The mission of the Portland Children's Levy (PCL) is to prepare children for school; support children's success inside and outside of school; and eliminate 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.</p>
<b>Bureau Overview</b>	<p>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.</p> <p>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.</p>
<b>Strategic Direction</b>	<p>Strategic direction for the FY 2019-2020 funding round was set 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 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 reflected these preferences and weighted scoring toward organizations and programs that met these criteria.</p> <p>Report recommendations also informed development of programmatic strategies. All funded programs address at least one programmatic strategy detailed below:</p>

Early Childhood : Provide affordable, high quality preschool programs with small adult: child ratios and focused on quality standards; enhance parent/family support of child development and nurturing; support families, childcare providers, and teachers with guiding child behavior.

Child Abuse Prevention/Intervention : Enhance parenting skills to promote healthy child development; intervene to lessen harms and prevent future risk; connect families to needed resources and supports for stabilization.

Foster Care : Enhance support and training for foster parents to promote healthy child development; provide individualized support to promote child and youth well-being.

After School : Provide intensive academic support and tutoring; support healthy relationship building, positive behavior and social emotional skill development; provide engaging enrichment opportunities.

Mentoring : Support youth's academic success and positive development

Hunger Relief : Provide food for pickup at a variety of community locations including schools; provide mobile food banks or pantries and/or home delivery of food to children and families experiencing food insecurity; provide training and education on nutrition, cooking, food budgeting, smart shopping, accessing local food resources, gardening for food production and community gardening resources to children and their caregivers.

PCL completed a competitive funding round for large grants in all program areas as required by the ballot measure authorizing the Levy in April and May 2020. In June 2020, City Council approved grants totaling up to \$68,399,601 over three fiscal years beginning July 1, 2020.

PCL also developed a small grants fund to improve equitable access to Levy funding as recommended in a 2019 Portland State University study . The Committee allocated \$1 million over three years to pilot 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.

In November 2020, the PCL Allocation Committee recommended \$1 million in funding for eight programs in the new Small Grants Fund. In December 2020, City Council approved these recommendations for 3-year grants, seven of which began in January 2021. One grantee elected not to accept the grant award.

City Council approved 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 childcare subsidies, and supports culturally specific childcare provider networks to improve childcare quality.

## **Summary of Budget Decisions**

### **Base Budget Adjustments**

PCL is adding a Community Engagement Coordinator in the Spring of 2022.

### **Major Issues**

The Portland Children's Levy (PCL) became a City bureau in FY 2018-19. Prior to that time, the Children's Levy was part of the Office of the Commissioner of Public Affairs.

# Portland Children's Levy

Performance	Actuals FY 2019-20	Actuals FY 2020-21	Target FY 2021-22	Target FY 2022-23	Strategic Target
<b>EFFICIENCY</b>					
Administrative cost as percentage of cumulative tax revenue	4.7%	4.7%	5.0%	5.0%	5.0%
<b>OUTCOME</b>					
Number of children served in Hunger Relief programs	9,520	21,395	15,000	10,000	15,000
Percent of children in early childhood services programs who met age appropriate developmental milestones	83	87	85	85	85
Percentage of foster youth served who met academic goals	96	69	85	85	85
Percentage of parents participating in child abuse prevention and intervention programs who met parenting goal	91	87	80	80	80
Percentage of youth in after-school programs who met youth development goals	91	88	80	80	80
Percentage of youth in mentoring programs who met school engagement goals	96	92	85	85	85
<b>OUTPUT</b>					
Number of children served	10,575	5,765	10,000	8,000	10,000
<b>WORKLOAD</b>					
Number of administrative cost audits	1	1	1	1	1
Number of grant contracts managed	70	92	93	92	90

## Portland Children's Levy

	Actuals FY 2019-20	Actuals FY 2020-21	Revised FY 2021-22	Requested No DP FY 2022-23	Requested Total FY 2022-23
<b>External Revenues</b>					
Taxes	21,222,234	22,076,028	21,403,372	23,249,760	23,249,760
Miscellaneous	367,981	194,661	0	0	0
<b>External Revenues Total</b>	<b>21,590,215</b>	<b>22,270,689</b>	<b>21,403,372</b>	<b>23,249,760</b>	<b>23,249,760</b>
<b>Internal Revenues</b>					
Fund Transfers - Revenue	0	0	475,944	379,962	379,962
<b>Internal Revenues Total</b>	<b>0</b>	<b>0</b>	<b>475,944</b>	<b>379,962</b>	<b>379,962</b>
Beginning Fund Balance	10,672,563	0	8,999,000	8,798,984	8,798,984
<b>Resources Total</b>	<b>32,262,778</b>	<b>22,270,689</b>	<b>30,878,316</b>	<b>32,428,706</b>	<b>32,428,706</b>
<b>Bureau Expenditures</b>					
Personnel Services	883,626	922,760	879,819	1,077,853	1,077,853
External Materials and Services	18,736,917	19,548,629	29,076,843	27,666,716	27,666,716
Internal Materials and Services	51,653	46,086	57,226	53,625	53,625
<b>Bureau Expenditures Total</b>	<b>19,672,196</b>	<b>20,517,475</b>	<b>30,013,888</b>	<b>28,798,194</b>	<b>28,798,194</b>
<b>Fund Expenditures</b>					
Contingency	0	0	839,428	3,605,512	3,605,512
Fund Transfers - Expense	25,000	25,000	25,000	25,000	25,000
<b>Fund Expenditures Total</b>	<b>25,000</b>	<b>25,000</b>	<b>864,428</b>	<b>3,630,512</b>	<b>3,630,512</b>
Ending Fund Balance	12,565,582	0	0	0	0
<b>Requirements Total</b>	<b>32,262,778</b>	<b>20,542,475</b>	<b>30,878,316</b>	<b>32,428,706</b>	<b>32,428,706</b>
<b>Programs</b>					
Administration & Support	1,059,472	1,057,271	1,089,405	1,286,688	1,286,688
Investing in Children	18,612,725	19,460,203	28,924,483	27,511,506	27,511,506
<b>Total Programs</b>	<b>19,672,196</b>	<b>20,517,475</b>	<b>30,013,888</b>	<b>28,798,194</b>	<b>28,798,194</b>

# Portland Children's Levy

Class	Title	Salary Range		Adopted FY 2021-22		Requested No DP FY 2022-23		Requested Total FY 2022-23	
		Min	Max	No.	Amount	No.	Amount	No.	Amount
30003006	Analyst I	53,290	111,696	1.00	79,204	1.00	82,087	1.00	82,087
30003007	Analyst II	63,336	119,136	2.00	195,324	2.00	200,267	2.00	200,267
30003008	Analyst III	69,805	142,817	1.00	121,493	1.00	125,902	1.00	125,902
30003029	Coordinator III	63,336	119,136	1.00	86,946	1.00	90,101	1.00	90,101
30003055	Financial Analyst II	63,336	119,136	0.90	81,370	0.90	84,315	0.90	84,315
30003097	Public Information Officer	63,336	119,136	0.00	0	0.00	0	0.00	0
	Total Full-Time Positions			5.90	564,337	5.90	582,672	5.90	582,672
30003028	Coordinator II	53,290	111,696	0.00	0	0.80	69,888	0.80	69,888
	Total Part-Time Positions			0.00	0	0.80	69,888	0.80	69,888
	<b>Grand Total</b>			<b>5.90</b>	<b>564,337</b>	<b>6.70</b>	<b>652,560</b>	<b>6.70</b>	<b>652,560</b>

	Actuals FY 2019-20	Actuals FY 2020-21	Revised FY 2021-22	Base Budget FY 2022-23	Requested FY 2022-23
<b>External Revenues</b>					
Taxes	21,489,741	22,076,028	21,403,372	23,249,760	23,249,760
Miscellaneous	367,981	194,661	0	0	0
<b>External Revenues Total</b>	<b>21,857,723</b>	<b>22,270,689</b>	<b>21,403,372</b>	<b>23,249,760</b>	<b>23,249,760</b>
<b>Internal Revenues</b>					
Fund Transfers - Revenue	0	0	475,944	379,962	379,962
<b>Internal Revenues Total</b>	<b>0</b>	<b>0</b>	<b>475,944</b>	<b>379,962</b>	<b>379,962</b>
Beginning Fund Balance	10,672,563	12,833,113	8,999,000	8,798,984	8,798,984
<b>Resources Total</b>	<b>32,530,286</b>	<b>35,103,802</b>	<b>30,878,316</b>	<b>32,428,706</b>	<b>32,428,706</b>
<b>Bureau Expenditures</b>					
Personnel Services	883,626	922,760	879,819	1,077,853	1,077,853
External Materials and Services	18,736,917	19,548,629	29,076,843	27,666,716	27,666,716
Internal Materials and Services	51,629	46,086	57,226	53,625	53,625
<b>Bureau Expenditures Total</b>	<b>19,672,173</b>	<b>20,517,475</b>	<b>30,013,888</b>	<b>28,798,194</b>	<b>28,798,194</b>
<b>Fund Expenditures</b>					
Contingency	0	0	839,428	3,605,512	3,605,512
Fund Transfers - Expense	25,000	25,000	25,000	25,000	25,000
<b>Fund Expenditures Total</b>	<b>25,000</b>	<b>25,000</b>	<b>864,428</b>	<b>3,630,512</b>	<b>3,630,512</b>
Ending Fund Balance	12,833,113	14,561,327	0	0	0
<b>Requirements Total</b>	<b>32,530,286</b>	<b>35,103,802</b>	<b>30,878,316</b>	<b>32,428,706</b>	<b>32,428,706</b>

## 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.

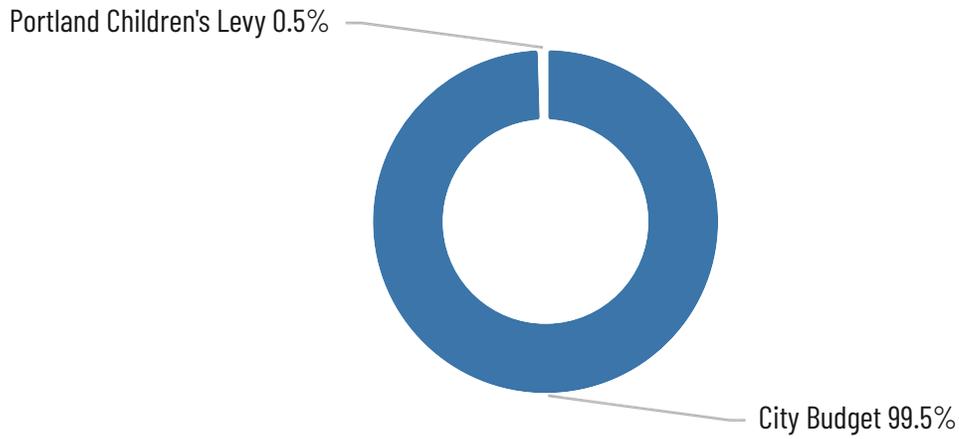
Decisions on grant expenditures of the Children’s Levy are made by a five-person committee and approved by City Council. Administrative expenditures are capped at 5% of the fund by law. All allocations must be made in conformance with the levy language as approved by voters.

**Managing Agency**      Portland Children’s Levy

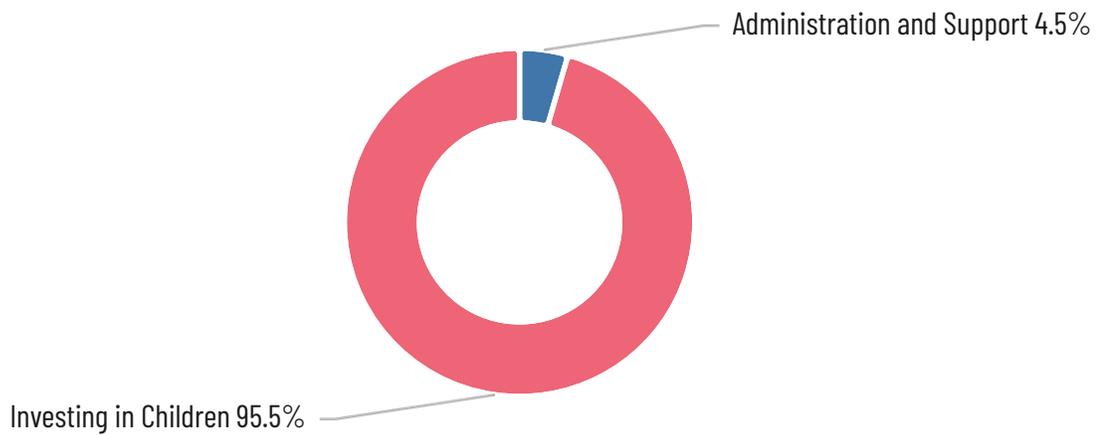
**Significant Changes**    There are no significant changes in the FY 2022-23 Adopted Budget.

## Portland Children's Levy

Percent of City Budget Graph



Bureau Programs



Bureau Overview

Requirements	Revised FY 2021-22	Requested with DP FY 2022-23	Change from Prior Year	Percent Change
Operating	\$30,878,316	\$32,428,706	\$1,550,390	5%
Capital				
<b>Total</b>	<b>\$30,878,316</b>	<b>\$32,428,706</b>	<b>\$1,550,390</b>	<b>5%</b>
Authorized Positions	5.90	6.70	0.80	13.56%

## Investing in Children

### Program Description & Goals

The goals of the Portland Children’s Levy are to prepare children for school, support children’s success inside and outside of school, eliminate racial and ethnic disparities in children’s well-being and school success.

Performance	Actuals FY 2019-20	Actuals FY 2020-21	Target 2021-22	Target FY 2022-23	Strategic Target
Number of children served	10,575	5,765	10,000	8,000	10,000
Number of administrative cost audits	1	1	1	1	1
Number of grant contracts managed	70	92	93	92	90

### 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 \$23.2 million in FY 2022-23. The Children’s Investment Fund is projected to have a fund balance of \$8.8 million on July 1, 2022. 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 two 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 five-member Allocation Committee includes: a City of Portland commissioner; a Multnomah County commissioner; a member of the business community and a citizen member with knowledge and experience on children’s issues appointed by the Mayor; 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 2020, the Allocation Committee recommended 84 grants for three years, beginning July 1, 2020; City Council approved these recommendations. In September 2020, the Allocation Committee recommended 8 grants as part of the new Small Grants Fund. The total grant budgets for FY 2022-23 is \$27.5 million.

### 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 FY 2020-21 shows that 72% of the children served in PCL funded programs identified as Black, Indigenous or children of color (BIPOC). Data gathered

between FY 2014-20 show similar proportions of BIPOC children enrolling and meeting participation goals in programs. This data indicates that BIPOC children are accessing Levy funded programming and programs are successfully engaging children. See annual data reports on our website at: [www.portlandchildrenslevy.org/about/performance-and-results](http://www.portlandchildrenslevy.org/about/performance-and-results) for detailed reporting on demographics of populations served, program participation rates and outcomes of children/parents.

## Changes to Program

The bulk of the Portland Children’s Levy programming is similar to prior years.

The Portland Children’s Levy is funding a new Small Grants Fund which began in January 2021. The first seven grant contracts totaling \$1 million over three years began in January 2021.

## Program Budget

	Actuals FY 2019-20	Actuals FY 2020-21	Revised FY 2021-22	Requested Base FY 2022-23	Requested with DP FY 2022-23
<b>Bureau Expenditures</b>					
External Materials and Services	18,612,725	19,460,203	28,924,483	27,511,506	27,511,506
<b>Bureau Expenditures Total</b>	18,612,725	19,460,203	28,924,483	27,511,506	27,511,506
<b>Fund Expenditures</b>					
Contingency	0	0	(3,900,000)	0	0
<b>Fund Expenditures Total</b>	0	0	(3,900,000)	0	0
<b>Requirements Total</b>	18,612,725	19,460,203	25,024,483	27,511,506	27,511,506

## Budget Narrative

- 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 \$23.2 million in FY 2022-23. There will be a funds transfer of \$379,962 from the Portland Parks Levy to the Children’s Levy in FY23; this funds transfer is the result of a provision in the ordinance that authorized the Parks Levy. The Children’s Investment Fund is projected to have a fund balance of \$8.8 million on July 1, 2022.
- Expenses** The Children’s Levy is budgeting \$27,511,506 for program expenditures in FY 2022-23. The Children’s Levy plans to spend up to \$1,346,869 to administer the fund in FY 2022-23; this figure is 4.7% of budgeted expenditures for the fiscal year.
- Staffing** The Children’s Levy employs seven individuals who work 6.8 FTE. The Levy is led by the Director and Assistant Director who also serve as Grant Managers. Two additional Grant Managers work for the Levy. The Levy is working to add a Community Engagement Coordinator in the spring of 2022. The Levy also employs a Communications & Outreach Director and a Financial Analyst.

## Portland Children's Levy

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**Assets & Liabilities**     The Children's Levy is projected to begin FY 2022-23 with a fund balance of \$8.8 million. The Levy has no liabilities.

### Program Information

**Program Contact:**     Lisa Pellegrino

**Contact Phone:**     503.865.6061

**Website:**             [www.portlandchildrenslevy.org](http://www.portlandchildrenslevy.org)

City of Portland  
**Portland Children's Levy**

PM1. Report for FY 2022-23 Requested Budget

Run Date & Time

Tuesday, January 25, 2022

11:04:11 AM

**OUTCOME MEASURES**

	Performance Measure	KPM	FY 2019-20 Actuals	FY 2020-21 Actuals	FY 2021-22 YTD Actuals	FY 2022-23 Target	Strategic Target
CL_0005	Number of children served in Hunger Relief programs		9,520	21,395	0	10,000	15,000
CL_0006	Percent of children in early childhood services programs who met age appropriate developmental milestones		83	87	0	85	85
CL_0007	Percentage of parents participating in child abuse prevention and intervention programs who met parenting goal		91	87	0	80	80
CL_0008	Percentage of foster youth served who met academic goals		96	69	0	85	85
CL_0010	Percentage of youth in after-school programs who met youth development goals		91	88	0	80	80
CL_0011	Percentage of youth in mentoring programs who met school engagement goals		96	92	0	85	85

**EFFICIENCY MEASURES**

	Performance Measure	KPM	FY 2019-20 Actuals	FY 2020-21 Actuals	FY 2021-22 YTD Actuals	FY 2022-23 Target	Strategic Target
PA_0001	Administrative cost as percentage of cumulative tax revenue		4.7%	4.7%	0	5.0%	5.0%

**OUTPUT MEASURES**

City of Portland  
**Portland Children's Levy**

PM1. Report for FY 2022-23 Requested Budget

**Run Date & Time**

Tuesday, January 25, 2022

11:04:11 AM

Performance Measure	KPM	FY 2019-20 Actuals	FY 2020-21 Actuals	FY 2021-22 YTD Actuals	FY 2022-23 Target	Strategic Target
PA_0002 Number of children served	X	10,575	5,765	0	8,000	10,000

**WORKLOAD MEASURES**

Performance Measure	KPM	FY 2019-20 Actuals	FY 2020-21 Actuals	FY 2021-22 YTD Actuals	FY 2022-23 Target	Strategic Target
PA_0003 Number of administrative cost audits		1	1	0	1	1
PA_0004 Number of grant contracts managed		70	92	0	92	90

Portland Children's Levy has no decision packages in the FY22-23 Requested Budget

## Portland Children's Levy

### Plan Overview

The Portland Children's Levy is currently in year 3 of a 5-year authorization. This plan assumes that the Levy will be renewed by Portland voters to continue beyond FY 23-24.

### Revenue Assumptions

Property tax estimates are provided by the City Economist. The most recent estimate is from January 2022.

In the resolution referring the Parks Levy to voters, City Council resolved to allocate funds from the Parks Levy to the Children's Levy to offset increased compression on the Children's Levy. Amounts included are estimates based on current year actuals.

Current year interest is an estimate based on YTD actuals. No reliable estimate of interest revenue is available for future years, so none is included.

### Expenditure Assumptions

Grant expenditures are based on current funding commitments that have granted funds through FY22-23. Beyond that time, a reduction in total grant expenditures is needed to maintain positive fund balance. Given the uncertainties of revenue levels and possible underspending by grantees, this situation is likely to change.

Personnel and other expenses are assumed to remain at current levels with modest annual increases for COLA.

### Expenditure Risks to the Forecast and Confidence Level

Apart from revenue uncertainty, confidence in these projections is high. Should revenue levels rise or fall, expenditures could be adjusted as needed.

## FY 2022-27 Requested Budget Five Year Plan

### Portland Children's Levy/Children's Investment Fund

Resources	CY Estimate	FY 2022-23 Plan	FY 2023-24 Plan	FY 2024-25 Plan	FY 2025-26 Plan	FY 2026-27 Plan
Beginning Fund Balance	14,662,636	8,798,984	3,540,418	1,257,881	410,786	358,892
Current Year Property Taxes	22,189,337	22,988,384	23,739,858	24,601,789	25,389,046	26,201,496
Prior Year Property Taxes	255,702	261,376	268,049	275,670	285,320	294,923
Allocation from Parks Levy	379,962	380,000	380,000	380,000	380,000	380,000
Interest	100,000	-	-	-	-	-
<b>Resource Total</b>	<b>37,587,637</b>	<b>32,428,744</b>	<b>27,928,325</b>	<b>26,515,340</b>	<b>26,465,152</b>	<b>27,235,311</b>

Expenditures	CY Estimate	FY 2022-23 Plan	FY 2023-24 Plan	FY 2024-25 Plan	FY 2025-26 Plan	FY 2026-27 Plan
Grants Total	27,329,067	27,261,506	25,050,000	24,450,000	24,450,000	24,450,000
Other Program Costs*	250,000	250,000	250,000	250,000	250,000	250,000
Personnel	970,000	1,113,034	1,135,295	1,158,001	1,158,001	1,158,001
External M&S - administrative	157,360	155,210	159,866	164,662	164,662	169,602
Internal M&S - administrative	57,226	53,625	55,234	56,891	58,597	60,355
General Fund Overhead	25,000	25,000	25,000	25,000	25,000	25,000
<b>Expense Total</b>	<b>28,788,653</b>	<b>28,858,375</b>	<b>26,675,395</b>	<b>26,104,554</b>	<b>26,106,260</b>	<b>26,112,958</b>

<b>Planned FTE Total</b>	<b>6.8</b>	<b>6.8</b>	<b>6.8</b>	<b>6.8</b>	<b>6.8</b>	<b>6.8</b>
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\* Other Program Costs include training and technical assistance for grantee staff.

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## Portland Children's Levy

### Requested Budget & Racial Equity Plan Update:

PCL's authorizing legislation requires that all Levy investments support achievement of the following goals:

1. Children are prepared for school.
2. Children are supported to succeed inside and outside of school.
3. Racial and ethnic disparities in children's well-being and success are eliminated.

PCL's racial equity goals include:

- Improve equity and transparency in funding processes, and equitable access to Levy funds among community-based organizations.
- Support programs effectively serving Black, Indigenous and children of color (BIPOC) and their families.
- Support organizations with staff and board members that reflect the racial and ethnic identities of the populations they serve.
- Create a council of community members that reflect populations served by PCL to advise staff and Allocation Committee on PCL grant funding and monitoring processes.

#### Equitable and Transparent Funding Process

PCL works to ensure equitable competitive funding processes to grant funds. In preparation for the most recent competitive funding round for large grants (2019-2020), 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, the majority of which were adopted, including:

- Require all questions about the funding application to 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 funding applicants, and assure additional time is provided for people requesting interpretation.
- 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.

To ensure community priorities informed the 2019-20 funding process, PCL worked with Empress Rules Equity Consulting to gather community input on current needs of children and families and preferred community solutions. Report recommendations 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.

#### Equitable Access to Levy Funds through Small Grants Fund

As recommended in PSU's report, PCL piloted a small grants fund in 2020 (\$1 million over 3 years) to improve equity of access to PCL funding for smaller organizations serving historically marginalized populations that had not received Levy funding in the past. PCL staff engaged a 6-member volunteer team to design the funding process and participate in scoring and recommending programs for funding. Design Team volunteers identified collectively as African refugee, Latinx, disabled, Vietnamese refugee, Native American, African American, LGBTQIA+.

Before issuing a funding application, PCL staff hosted 8 community conversations to provide information to 30 small, community-based organizations on the funding opportunity, identify technical assistance needs, and gather input on how to best facilitate an equitable process. The Design Team then created a 2-step process with a short Step 1 application to minimize upfront time investment by small organizations. The Design Team and volunteer community reviewers scored Step 1 applications, decided which organizations would advance to Step 2 of the

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application process, and made recommendations to the Levy's Allocation Committee for funding. The Allocation Committee accepted all funding recommendations unanimously to fund 8 organizations providing services to children with disabilities, children identifying as BIPOC, immigrant and refugee, LGBTQIA+, two spirit, and non-binary. Funded organizations offer services primarily in North and East Portland.

### Populations Served by Levy Programs

Programs funded through the Portland Children's Levy in FY 2015 through FY 2020 have consistently served 65-70% BIPOC children. In 2020-21, 80% of the children served in Levy funded programs identified as BIPOC. In contrast, 52.4% of children attending Portland schools identified as BIPOC in 2020-21. In FY 2020-21, children served in Levy funded programming identified as the following race/ethnicities:

- Latinx/Hispanic: 25.9%
- African American: 17.4%
- Multiracial: 13.5%
- Asian: 8.3%
- African: 6.1%
- American Indian/Alaska Native: 3.5%
- Slavic: 1.8%
- Native Hawaiian/Pacific Islander: 1.1%
- Middle Eastern: 2.0%
- White: 14.2%
- Not Given: 6.1%

Grantees who collected data on children with disabilities reported 10.4% identified as having a disability, 72.6% reported no disability, and 17% did not respond to the question.

Data collected FY 2015 through FY 2019 show that BIPOC met program participation goals in the same proportion as they enrolled in programming, indicating that programs successfully keep BIPOC engaged in programming. In 2020-21 when most services were delivered virtually, 83% of people served attended services at least weekly, 69% attended that frequently for at least 45 minutes, and 73% participated in services at least 6 months.

PCL also monitors the percentage of children served who reside or go to school in East Portland due to high child poverty rates as compared to Portland as a whole. In 2020-21, 43.6% of children served lived or went to school East of 82nd Avenue. In contrast, approximately 25% of the population in Portland resides in East Portland.

### Funded Organizations Reflect Populations Served

In 2020-21 43 of 51 funded organizations reported on the race/ethnicity of all clients served by the organization, their staff and board of directors. Twenty-five (53%) of these organizations served majority BIPOC clients, 22 (47%) had majority BIPOC direct service staff, 20 (43%) had majority BIPOC management staff, and 17 (36%) had majority BIPOC boards of directors.

### Formation of Community Council

Based on recommendations of Empress Rules Equity Consulting, PSU and the Small Grants Fund Design Team, PCL's equity plan includes a goal for 2021-22 to form a Community Council to regularly engage affected communities in decisions on PCL grant funding and monitoring processes. After a 6-month process with two stakeholder feedback loops, the Allocation Committee authorized formation of a Community Council of community volunteers. Staff will move forward with recruitment and selection of council members and hiring additional staff to support the Council in the remainder of FY22

**Racial Equity Plan Link:**

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**Requested Budget Community Engagement:**

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The grants funded in this budget were made in a large grant funding round (2019-2020) and a small grant funding round (2020). Before creating the funding priorities and application in the large grant funding round, PCL hired Empress Rules Equity Consulting to engage community members and service providers around community needs, preferred services and methods of delivery, and barriers to access. 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 be 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 BIPOC (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.

Funded organizations must demonstrate a strong commitment to racial equity, diversity and inclusion and work to empower communities most impacted by inequities. They must 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, must demonstrate that services offered are based on clients' expressed needs, and address barriers to access.

See response to question 1 above for information on how the small grants fund was designed, outreach and input gathered, and funded organizations.

**Base Budget Constraints:**

PCL does not anticipate any insufficiencies that would inhibit achievement of equity goals for the next fiscal year. The 5% administrative cap against which all PCL staffing costs are charged means there is limited ability to increase staff which may impact timelines for goals related to improving equity in grant management practices, participatory evaluation, and community data sharing.

**Notable Changes:**

No impact.

**Equity Manager Role in Budget Development**

Not applicable

**Equity  
Manager:**

**Contact  
Phone:**

**ADA Title II Transition Plan:**

Not applicable

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**Accommodations:**

Funding for translation, interpretation, video captioning and other accommodations for a range of disabilities, and translation of essential documents into safe harbor languages is included in PCL's administrative budget for activities and documents led or produced by PCL staff. In addition, the budget includes funds to create and staff community volunteers to participate in a Community Council that will advise PCL on grant funding and monitoring processes. Individual grant budgets support multi-lingual staff, outreach and engagement of multi-lingual and multi-cultural communities, and include funds for translation and interpretation (written and oral).

**Capital Assets & Intergenerational Equity**

Not applicable

Measure Title	PM 2018-19 Actuals	PM 2019-20 Actuals	PM 2019-20 Target	PM 2020-21 Target	Strategic Target
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Data Tracking Methodology:

PCL's methods for tracking data on funded programs are detailed in its Goals, Strategies and Performance Measures framework. The framework describes 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, family income, disability), 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 2020-21 report is currently being finalized and will be published in February 2022. A summary of Levy-wide aggregated data for 2020-21 is below. Please note that data below does not include hunger relief service recipients for reasons detailed in the report.

Demographics of Children Served, 2020-2021:

Gender: 50.9% identified as female; 44.6% identified as male, .4% identified as transgender, .2% identified as genderqueer, .6% identified as non-binary, and 3.3% did not report gender.

Age: Ages of children and young adults served were as follows:

- 0-5 (pre-school): 28.5%
- Grades K-5: 22.6%
- Grades 6-8: 18.4%
- Grades 9-12: 25.8%
- Age 19-24 (foster care programs): 2.9%
- Not Given: 1.6%

Primary Language: 51.6% spoke English, 20.3% spoke Spanish, 3.1% spoke Somali, 1.9 % spoke Vietnamese, 1.4% spoke Russian, 1% spoke Nepali, .6% spoke Chinese, .4% spoke Romanian, .2% spoke Chuukese, .1% spoke Romanian, 9.3% spoke other languages and 10.2% did not report primary language.

Disability: Grantees who collected data on children with disabilities reported 10.4% identified as having a disability, 72.6% reported no disability, and 17% did not respond to the question.

Residence: 43.6% of children resided or went to school east of 82nd Ave.

Racial/Ethnic Identity: See response to Question 1.

Family Income: 94% of children on whom this data was reported lived in families with an income at 185% or less of the federal poverty level.

Service Data, 2020-21

Children Served: Grantees served 5,765 children (74% of annual goal). Grantees typically exceed goals for number of children served; however during the pandemic, many grantees served fewer youth with more intensive and/or 1:1 services.

Participation Data: PCL modified reporting requirements on participation in services to reflect service modifications necessary during the pandemic.

Grantees reported that 80.2% of people served participated in program services weekly or more, 69% participated for at least one hour, and 73% were enrolled in services for at least 6 months.

Outcome Goals: Grantees met 67% of outcome goals in grant agreements. This measure compares number of goals met to total goals. In 2020-21, some outcomes could not be measured due to the pandemic which interrupted and/or changed services delivered or made it difficult to assess progress and complete survey instruments. In addition, the cancellation of in-person schooling for most of the academic year affected measurement of goals for school attendance and behavior.

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### **Hiring, Retention, & Employment Outreach:**

PCL's 2019-2022 Affirmative Action Plan includes 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 6 staff positions, 5 filled and 1 vacant. 60% of current staff identify as white, 40% identify as African American; 60% identify as female and 40% 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. PCL replaced a retiring grant manager (foster care and child abuse program area) in 2021 and used a similar hiring process. A diverse pool of candidates applied; one of the two finalists identified as a person of color with experience in the state child welfare system and the other finalist identified as a former foster child. PCL is currently recruiting to fill a vacant communications position and plans to recruit for a community engagement coordinator to staff the Community Council. Similar recruitment processes will be used in accordance with our Affirmative Action Plan strategies.

Three 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. All PCL staff have taken advanced equity training, and we meet monthly to address ongoing equity, diversity and inclusion topics and issues. Equity goals are regularly included in the annual performance goals for each employee.

### **Contracting Opportunities**

PCL prioritizes hiring D/M/W/ESB listed contractors for professional service needs such as quality assessment and improvement assistance and training for grantees, community engagement, evaluation expertise, independent financial audit, and communications (web site, design, community report design). PCL currently has 2 contracts that extend into FY 2023 and both are with D/M/W/ESB entities.

### **Engaging Communities Most Impacted by Inequities**

This budget supports 52 community-based organizations to provide 92 programs to historically marginalized children and their families. PCL staff focus on supporting grantee programs and organizations including convening grantees for relationship building between organizations, understanding and helping to meet training and technical assistance needs, peer learning, consultation on grant monitoring practices, development of shared outcome goals and sharing quality improvement approaches and evaluation practices. In addition, as discussed above, formation of a Community Council is aimed at building PCL capacity to regularly engage and include communities most impacted by inequities to affect grant funding policies and procedures.

### **Empowering Communities Most Impacted by Inequities**

All organizations supported through PCL build community capacity and power in multiple ways including employment and volunteer leadership opportunities for service users and community members, advisory boards, community meetings and events, convening focus groups, and community organizing for advocacy efforts.

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