

RACIAL EQUITY PLAN
Furthering the Citywide Racial Equity Goals and Strategies
For the Period July 1, 2016 to June 30, 2021

Bureau: City Budget Office Director: Andrew Scott Action Plan Development Lead(s): Ryan Kinsella Implementation Team Lead(s):

Bureau Equity Guiding Statement: Through the City Budget Office's Racial Equity plan, the bureau aims to identify and address institutional racism in core bureau functions and within the organization; actions in the plan will guide how to create more racially equitable outcomes in the develop and monitoring of the City's budget.

1. Long-term Goal	Five Year Bureau Objective	Strategies and Bureau Actions*	Bureau Performance Measures					Evaluation Tool	Lead Staff	Oversight	Due Date
			Year 1	Year 2	Year 3	Year 4	Year 5				
Strengthen outreach and public engagement for communities of color and immigrant and refugee communities	City Budget Office has a positive reputation in communities of color for addressing racial inequities through its community engagement processes with communities of color.	Strategy: Understand who participates in the budget process									
		Action(s): Collect voluntary racial demographic data at City Budget Office hosted community budget events and all other outreach and engagement efforts. Share demographic results of engagement with community and City Council. Develop and conduct a survey at each of the community budget forums to determine the impact and perception of the bureau's racial equity work (i.e. use of best practices, community needs, and view of effectiveness)	Develop data collection method and define measure targets of what is successful, equitable engagement.	Percent of people of color engaged in outreach efforts reflect the city or neighborhood	Percent of people of color engaged in outreach efforts reflect the city or neighborhood	Percent of people of color engaged in outreach efforts reflect the city or neighborhood	Percent of people of color engaged in outreach efforts reflect the city or neighborhood	Database and website: Survey results tracked	Executive Assistant (Sarah Diffenderfer)	Jeremy Patton	9/1, Annually
		Strategy: Increase engagement in the budget process									
		Action(s): Develop a community communications and engagement plan to partner with leaders, organizations and coalitions working toward increasing engagement of underrepresented communities, with particular emphasis on increasing engagement with people of color and improving access to decision-making in the budget process. Refine engagement strategies based on feedback from community partners.	As part of overall public engagement strategy, identify and converse with community groups working towards racial equity	Implement plan developed through conversations with partners	Conduct two Budget 101 workshops in communities of color with at least 10 participants per workshop; increase participation to be proportionally similar to City demographics from people of color in budget outreach activities	Conduct two Budget 101 workshops in communities of color with at least 10 participants per workshop; increase participation to be proportionally similar to City demographics from people of color in budget outreach activities	Conduct two Budget 101 workshops in communities of color with at least 10 participants per workshop; increase participation to be proportionally similar to City demographics from people of color in budget outreach activities	Results tracked	Executive Assistant (Sarah Diffenderfer)	Jeremy Patton	12/1, annually (Budget Kickoff)
		Strategy: Operate with urgency and accountability									
		Action(s): Create webpage to report on outcomes of community engagement processes, including racial demographic data collected	Develop webpage with input from OEHR	Rollout live webpage	Annual update	Annual update	Annual update	Website	Executive Assistant (Sarah Diffenderfer)	Jeremy Patton	6/1, annually
		Strategy: Partner with other institutions									
		Action: Portland Utility Board (PUB) analyst will work with OEHR to identify community partners for PUB outreach; Increase outreach and communication of PUB meetings to communities of color; Annually locate regular PUB meetings in neighborhoods with large non-white populations.	Develop inclusive outreach plan; locate one meeting in a neighborhood with large non-white populations.	Locate two regular meetings in underrepresented communities.	Locate two regular meetings in underrepresented communities.	Implement year one of PUB outreach plan; locate two regular meetings in underrepresented communities.	Implement year one of PUB outreach plan; locate two regular meetings in underrepresented communities.	Annual PUB reports	PUB Analyst (Melissa Merrell)	Jeremy Patton	9/1, Annually
		Strategy: Incorporate feedback from communities of color in bureau operations									

		Action(s): Recruit new Bureau Advisory Committee members from communities of color. Incorporate equity in new PUB member recruitment and selection	25% of new members are self-identified people of color	25% of new members are self-identified people of color	25% of new members are self-identified people of color	25% of new members are self-identified people of color	25% of new members are self-identified people of color	25% of new members are self-identified people of color	Executive Assistant (Sarah Diffenderfer)	Jeremy Patton	9/1, Annually
2. Long-term Goal	Five Year Bureau Objective	Strategies and Bureau Actions	Bureau Performance Measures					Evaluation Tool	Lead Staff	Oversight	Due Date
			Year 1	Year 2	Year 3	Year 4	Year 5				
End disparities in city government hiring and promotions	CBO will operationalize equitable recruitment and hiring practices to ensure staff composition reflects the racial diversity of the community served and opportunities for professional development and growth are distributed equitably.	Strategy: Manage with racial equity lens									
		Action(s): Incorporate racial equity components into bureau staff and leadership annual performance evaluation. Leadership evaluation include input from their supervised employees.	20% of employees report that they are partially evaluated for how they are furthering the Bureau's racial equity goals.	40% of employees report that they are partially evaluated for how they are furthering the Bureau's racial equity goals.	60% of employees report that they are partially evaluated for how they are furthering the Bureau's racial equity goals.	80% of employees report that they are partially evaluated for how they are furthering the Bureau's racial equity goals.	100% of employees report that they are partially evaluated for how they are furthering the Bureau's racial equity goals.	Employee survey and personnel files	Principal Analysts, Team Leads	Jeremy Patton	9/1, Annually
		Strategy: Develop racial equity into core staff competencies									
		Action(s): Incorporate racial equity into professional development plan, and develop a regular schedule of trainings and plan to ensure base understanding and increasingly complex understanding in senior staff.	All staff members complete core City trainings. Identify trainings specifically appropriate for budget analysts.	Half of staff members attend additional professional development opportunity	All staff members attend at least one additional professional development opportunity. Develop plan for sharing training information across staff.	All staff members attend at least one additional professional development opportunity.	All staff members attend at least one additional professional development opportunity.	Employee survey and personnel files	Senior Analysts	Jeremy Patton	9/1, Annually
		Strategy: Use data to inform staffing decisions									
		Action(s): Collect data disaggregated by race on recruitment, hiring, and promotion activities and report publicly.	Data collection method developed and baseline established as compared to the Portland community	Increase in racial diversity over baseline	Maintain racial diversity in staff that is reflective of the community we serve	Maintain racial diversity in staff that is reflective of the community we serve	Maintain racial diversity in staff that is reflective of the community we serve	Personnel Annual Report	Assistant Budget Director	Jeremy Patton	9/1, Annually
3. Long-term Goal	Five Year Bureau Objective	Strategies and Bureau Actions	Bureau Performance Measures					Evaluation Tool	Lead Staff	Oversight	Due Date
			Year 1	Year 2	Year 3	Year 4	Year 5				
Change existing City services	Communities of color recognize	Strategy: Build organizational capacity									

using racial equity best practices to increase access for communities of color and immigrant and refugee communities	that budgeting and major programmatic and policy initiatives are working to track and reduce racial disparities	Action(s): CBO management team and bureau's budget and racial equity liaisons apply a racial equity tool to the bureau's base budget and programs. Community partners participate help identify policy and program priorities to analyze.	Pilot use of RET on one major policies or programs	RET results are posted online of 2-3 major policies or programs analyzed	RET results are posted online of 4 major policies or programs analyzed	RET results are posted online of 4 major policies or programs analyzed	RET results are posted online of 4 major policies or programs analyzed	Bureau website	Bureau equity lead, Budget Equity Team	Jeremy Patton	6/1, annually	
		Strategy: Implement a racial equity lens										
		Action(s): CBO partners with OEHR to train bureau managers and financial analysts to use a budget equity tool as a routine part of the City's budget process.	50% of managers and financial analysts are trained	100% of managers and financial analysts are trained	100% of all newly hired managers and financial analysts are trained	100% of all newly hired managers and financial analysts are trained	100% of all newly hired managers and financial analysts are trained	Personnel files	Budget Process Coordinator, Bureau Analysts	Jeremy Patton	9/1, Annually	
		Strategy: Share and refine budget equity tool										
		Action(s): CBO continues to work with Government Finance Officers Association or another outside partner, to continue the education of other governments in the use of a budget equity tool in policy and budget development.	Develop a communications plan for sharing budget equity tool. Explore the possibility of participating in GARE's municipal budgeting cohort to develop relationships with other budget offices and learn of best practices.	Identify entities; pilot sharing. Establish a relationship with other jurisdictions, such as the City of Seattle City Budget Office's Race and Social Justice Change Team, to share ideas and practices.	Identify entities; pilot sharing. .	Refine communication and education plan. Share with 2-3 entities.	Share with 2-3 entities.	Annual report	Equity Leads	Jeremy Patton	9/1, Annually	
		Strategy: Operate with urgency and accountability										
		Action(s): Add questions to the annual CBO customer service survey administered to our bureau and Council stakeholders to determine the impact and perception of the bureau's racial equity work during the budget review and recommendation process.	Survey developed and piloted	75% of respondents indicate the Budget Office is headed in the right direction	80% of respondents indicate the bureau is headed in the right direction	85% of respondents indicate the bureau is headed in the right direction	90% of respondents indicate the bureau is headed in the right direction	Bureau Customer Survey	Assistant Budget Director	Jeremy Patton	9/1, Annually	
		Strategy: Include equity in board trainings										
		Action(s): PUB members participate in racial equity workshop annually.	One workshop held. 90% of PUB members attend	One workshop held. 90% of PUB members attend	One workshop held. 90% of PUB members attend	One workshop held. 90% of PUB members attend	One workshop held. 90% of PUB members attend	Annual PUB reports	PUB Analyst (Melissa Merrell)	Jeremy Patton	9/1, Annually	
		Strategy: Target and prioritize investments to reduce racial disparities										
Action(s): CBO, in conjunction with OEHR, will track budget decisions and outcomes that are related to racial equity work on a citywide basis.	Tracking system established.	First year reporting completed for FY 2017-18 budget decisions.	Combined first and second reporting completed.	Revaluation of the reporting mechanism.	Continue reporting on prior year decisions.	Annual Decision Package and Prior Year Performance Report.	Senior Analysts	Andrew Scott	12/1, annually (Budget Kickoff)			
4. Long-term Goal	Five Year Bureau Objective	Strategies and Bureau Actions	Bureau Performance Measures					Evaluation Tool	Lead Staff	Oversight	Due Date	
			Year 1	Year 2	Year 3	Year 4	Year 5					
Racial equity and inclusion is an integral component of the Bureau's identity and culture.	CBO's structures and leadership uphold a racially equitable culture where internal and external accountability systems are in place and there is a high comfort level in talking about racial equity and organization-wide desire to continue capacity building and problem-solving.	Strategy: Build organizational capacity										
		Action(s): Create more opportunities for staff to participate on the Bureau Equity Committee, receive training on racial equity skills, and discuss how racial equity is relevant to their work.	100% of BEC members receive training on racial equity leadership skills and at least 75% report feeling more prepared to lead	100% of BEC members receive training on racial equity leadership skills and at least 100% report feeling more prepared to lead	100% of BEC members receive training on racial equity leadership skills and at least 100% report feeling more prepared to lead	100% of BEC members receive training on racial equity leadership skills and at least 100% report feeling more prepared to lead	100% of BEC members receive training on racial equity leadership skills and at least 100% report feeling more prepared to lead	BEC annual report	Principal Analysts, Team Leads	Jeremy Patton	9/1, Annually	
Strategy: Be data driven												

Action(s): Conduct an annual employee survey to garner feedback on the bureau's culture and racial equity work	60% of all employees participate	70% of all employees participate	80% of all employees participate	90% of all employees participate	95% of all employees participate	Employee survey	Assistant Budget Director	Jeremy Patton	9/1, Annually
Strategy: Communicate the importance and relevance of racial equity in the bureau's work									
Action(s): Leadership regularly communicates about the importance of racial equity issues and work through the bureau's internal (including guiding documentation) and external communications structures and at management meetings and all-staff gatherings.	70% of employees report feeling leadership prioritizes the racial equity work of the Bureau	75% of employees report feeling leadership prioritizes the racial equity work of the Bureau	80% of employees report feeling leadership prioritizes the racial equity work of the Bureau	85% of employees report feeling leadership prioritizes the racial equity work of the Bureau	90% of employees report feeling leadership prioritizes the racial equity work of the Bureau	Employee survey	Bureau Management Team	Andrew Scott	9/1, Annually

Bureau Director has reviewed and approves the plan and supports its implementation over the coming five years



Director Signature	Date
Andrew Scott	12/16/2016