



Budget Equity Assessment Tool

CITY POLICY

This Budget Equity Assessment Tool is a general set of questions to guide city bureaus and their Budget Advisory Committees in assessing how budget requests benefit and/or burden communities, specifically communities of color and people with disabilities. As noted in Portland's 25-year strategic plan, the Portland Plan, Goal-Based Budgeting, and page 102:

When fully implemented, the new budget approach will direct City of Portland bureaus and offices to:

- Use an asset management approach to achieve more equitable service levels across communities and geographies.
- Track and report on service levels and investments by community and geography, including expanding the budget mapping process
- Assess the equity and social impacts of budget requests to ensure programs, projects and other investments to help reduce disparities and promote service level equity, improve participation and support leadership development.
- Identify whether budget requests advance equity, represent a strategic change to improve efficiency and service levels and/or are needed to provide for basic public welfare, health and/or meet all applicable national and state regulatory standards.

It is the policy of the City of Portland that no person shall be denied the benefits of, or be subjected to, discrimination in any City program, service, or activity on the grounds of race, color, national origin, English proficiency, sex, age, disability, religion, sexual orientation, gender identity, or source of income. Additionally, the City's Civil Rights Title VI program guidelines obligate public entities to develop systems and procedures that guard against or proactively prevent discrimination, while simultaneously ensuring equitable impacts on all persons. Therefore, City bureaus may find this tool helpful when evaluating equitable impacts on all residents.

The Office of Equity and Human Rights is also available for discussion/training/consultation regarding the use of this document.

BUREAU/OFFICE/DEPARTMENT

SECTION ONE: BASE BUDGET

NOTE: *The charge of the Office of Equity and Human Rights is to remove barriers based on race and disability within Portland city government. Bureaus are charged with serving all residents, however this tool focuses specifically on information regarding race and disability.*

1. How have you maximized considerations of equity in your base budget?
2. Are there specific realignments in your base budget that either advance or inhibit equity?
3. Are there specific realignments in your base budget that would advance or inhibit your achievement of equity goals outlined in your bureau's Racial Equity Plan?
4. What funding have you allocated for translation, interpretation and ADA (American's with Disability Act) accommodation including ASL (American Sign Language) interpretation and video captioning?
5. Are there deficiencies in the on-going funding of your base budget that inhibit your bureau's achievement of equity or the goals outlined in your Racial Equity Plan?

SECTION TWO: DECISION PACKAGES

If your bureau or office has multiple decision packages, please address each one separately.

1. How does this program or service align with the goal of advancing equity or achieving goals outlined in your bureau's Racial Equity Plan?
 - a. Identify all Citywide Goals and or Strategies you are using:
 - i. <http://www.portlandoregon.gov/oehr/article/537589>
2. What areas of the city will be impacted by your program or service and is there a larger than average population of people of color in those areas?
 - i. To help you answer this question, the following map link shows where communities of color are greater than average for the city of Portland. <https://www.portlandoregon.gov/bps/article/508117>

This next link provides information on overall vulnerability, including maps of communities of color, lower income households, renters, and level of educational attainment. Together these four components are indicators of at risk populations.
 - ii. <http://www.portlandoregon.gov/bps/66107>
3. Identify impacts on how resource allocation includes improving ADA accessibility for people with disabilities. (See Attached Worksheet)
4. Identify impacts on workforce demographics. (Racial Equity Goal #1, Model Employer Resolution)

Section THREE: EQUITABLE ENGAGEMENT AND ACCESS (Racial Equity Goal #2)

1. How has community engaged with your requested budget, including this tool?
2. How does this budget build the bureau's capacity to engage with and include communities most impacted by inequities? (e.g., improved leadership opportunities, advisory committees, commissions, targeted community meetings, stakeholder groups, increased outreach, etc.)
3. How does this budget build community capacity and power in communities most impacted by inequities? (e.g., improved leadership opportunities within BAC, community meetings, stakeholder groups, increased outreach, etc.)

Identifying Impacts Worksheet

Once you have identified the populations/communities impacted, use the following chart to name the potential burdens and benefits.

Populations Impacted	Potential Positive Impacts	Potential Negative Impacts

Name of Bureau Director

Date

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