

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 providing a holistic assessment of how equity is prioritized and addressed within bureau budgets. This analysis will also hopefully highlight opportunities to implement changes, both in the short- and long-term, to help meet bureau and City equity goals.

This is the fifth year of the City of Portland Budget Equity Assessment Tool, as first envisioned in the Portland Plan. The goals are 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.

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.

Introduction

The FY 2019-20 budget development process includes a number of significant changes, in particular the transition to Program Offer budgeting. The Program Offer template is intended to provide a clear, concise description of bureau budgeted programs at the 6-digit functional area level. The template includes both general guiding questions to help bureaus use an equity lens when writing program descriptions, as well as a dedicated section within the template to provide equity information specific to that program. Bureaus will also be expected to identify equity impacts in any decision packages resulting from a Council Direction to Develop.

The Budget Equity Tool will continue to serve as a guide for more robust equity analysis. In your responses below, please consider your Requested Budget as a whole.

SECTION 1: BUREAU OPERATIONS

1. How does your Requested Budget advance your achievement of equity goals as outlined in your bureau's Racial Equity Plan?
2. Are there deficiencies in your base budget that inhibit your bureau's achievement of equity or the goals outlined in your Racial Equity Plan?

Please take a look at the City of Portland's workforce demographic dashboard: <https://www.portlandoregon.gov/oehr/article/595121>. How does your bureau's Requested Budget support employee equity in hiring, retention, and inclusion, particularly for communities of color and people with disabilities?

3. How does your bureau use quantitative and qualitative data to track program access and service outcomes for different populations?
4. How did you consider the impacts on underserved communities in the development of your budget?
5. Have you made any significant realignments or changes to your bureau's budget? If so, how/do these changes impact the community? Is this different for communities of color and/or people with disabilities?
6. If your bureau has capital assets, how does your Requested Budget take into consideration intergenerational equity (ensuring that those who are currently benefiting from the service are paying for its upkeep versus placing the financial burden on future generations)?

7. If applicable, how is funding being prioritized to meet obligations related to Title II of the Americans with Disabilities Act and the [bureau's Transition Plan barrier removal schedule](#)?
8. If applicable, how does your bureau's budget create contracting opportunities for disadvantaged, minority, women, and emerging small businesses (D/M/W/ESB)?
9. If your bureau has dedicated equity staff, such as an Equity Manager, how were they involved in developing your bureau's Requested Budget?

SECTION TWO: EQUITABLE ENGAGEMENT AND ACCESS

10. What funding have you allocated in your bureau's budget to meet the requirements of ADA (Americans with Disabilities Act) Title II and Civil Rights Title VI? This includes but is not limited to:
 - Funding for translation, interpretation, video captioning, and other accommodations
 - Translation of essential documents into safe harbor languages
11. How have community members engaged with your requested budget, including this tool?
12. 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.)
13. 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

Please use the following chart to name the potential burdens and benefits.

Populations Impacted	Potential Positive Impacts	Potential Negative Impacts

Name of Staff Contact

Name of Bureau Director

Date

Rev: December 2018

Frequently Asked Questions

How should a bureau use this tool to develop its budget?

Notably, the tool not only provides decision-makers with information on how budget decisions impact the bureau/city's equity goals, but the tool is also intended to guide budget development. In this sense, the process of using the tool is equally as valuable as the information it yields.

What are some ways in which the bureau advisory committee can use the tool?

Working through the tool should provide answers to impacts and opportunities, as well as uncover unintended consequences. It will also allow BAC's to see deficiencies in base budgets concerning equity and advocate on their bureau's behalf.

How will this information be used? Who is the audience?

Aiming to give greater consideration of how budget decisions impact different communities across the City and move forward the City's equity goals, beginning in the FY 2015-16 budget process the Office of Equity and Human Rights implemented the Budget Equity Tool. This tool includes a series of prompts that are intended to increase the consideration of equity in the development of bureau base budgets and decision packages in addition to providing decision-makers and the public with information on how underserved communities will be impacted by budget decisions.

The information will be reviewed by OEHR and CBO. During the budget sessions, both will offer thoughts, questions and possibly recommendations based on the information within the document. OEHR may engage with the bureau director prior to the presentation of the budget at the scheduled council session.

How will bureaus receive feedback on the tool?

Bureaus may receive general feedback from OEHR on their completion of the tool. Staff capacity precludes a formal report from being prepared. Bureaus that have an equity advisor will have the opportunity for engagement during the process and afterward. Others can connect with the OEHR Director for feedback.

Who can I contact for assistance?

Please contact Koffi Dessou, your bureau's OEHR equity contact, or CBO analyst for assistance.

Additional Resources

Link to Racial Equity Plans

<https://www.portlandoregon.gov/oehr/70048>

CBO Contacts

<https://www.portlandoregon.gov/cbo/article/474294>

OEHR Portfolio Contacts

OEHR will be in contact with each bureau regarding their FY 2019-20 assigned Equity Contact.