



Office of the City Auditor

FY 2024-25

Requested Budget

Contents

Cover Letter

Service Area Summary & Narrative

Organizational Chart

Budget

Program Offer Report

Decision Package Report

Budget Equity Assessment Tool



**Portland
City Auditor**

Simone Rede





February 16, 2024

To: Mayor Ted Wheeler
Commissioner Carmen Rubio
Commissioner Rene Gonzalez
Commissioner Mingus Mapps
Commissioner Dan Ryan
City Budget Director Timothy Grewe

From: Auditor Simone Rede

Re: Fiscal Year 2024-25 Requested Budget

This Requested Budget addresses critical issues facing the Auditor's Office and broadens our Office's service to the City and its residents. It is responsive to the choice voters made in November 2022 to transform our government and its election system. In many ways, the work of the Auditor's Office will result in the most tangible impacts of the City's transition to Portlanders—they will see changes in how they vote, who gets elected, and how those elected govern. The Requested Budget is necessary to successfully implement Charter reforms and facilitate unprecedented collaboration with City and community partners. It follows the Mayor's guidance to only include decision packages related to charter transition.

First, the Requested Budget makes programmatic changes associated with voter-approved Charter reforms, adding needed capacity to the Council Clerk, and returning the Hearings Office to the Auditor's Office. The Council Clerk team requires additional staff to serve an expanded Council and manage a new legislative process that will include Council committees. These Committees, if properly managed, can deepen public engagement with, and trust in, the legislative process. The return of the Hearings Office, and an associated change to how it is funded, will ensure members of the public continue to have timely access to due process.

Second, the Requested Budget builds the necessary capacity to administer open and accountable City elections. It is designed to address the needs of voters, candidates, and an expanded twelve-member Council. The Requested Budget adds new capacity to meet Charter-mandated voter education needs, with focused resources to prepare hard-to-reach and low-turnout voters through community partnerships. The 2024 election cycle is expected to see an unprecedented number of City candidates. The Requested Budget ensures the Elections Division can deliver high-quality candidate education while meeting our Charter-mandated deadlines for campaign finance enforcement.

Third, the Requested Budget supports the Office's ability to deliver high-quality services by funding the education, equipment, and expertise our Office needs. Well-trained archivists, auditors, and ombudsmen deliver high-quality services and experiences to the public. Developing our skills and partnerships will make our work more timely, accurate, and relevant. Further, building connections with underserved communities through expanded community engagement efforts will improve public understanding of City functions.

In 2020, Council approved a reserve fund to secure annual underspending in the Auditor's Office up to \$500,000 to be used for the Auditor's priorities. In this Requested Budget I have applied \$100,000 of the reserve fund to provide a critical check on our administrative authority through a contracted organizational efficiency and compliance assessment. I have also applied \$150,000 to create a limited term Deputy General Counsel position to support the anticipated high volume of elections-related legal obligations.

Service Area Description

Run Date: February 15, 2024

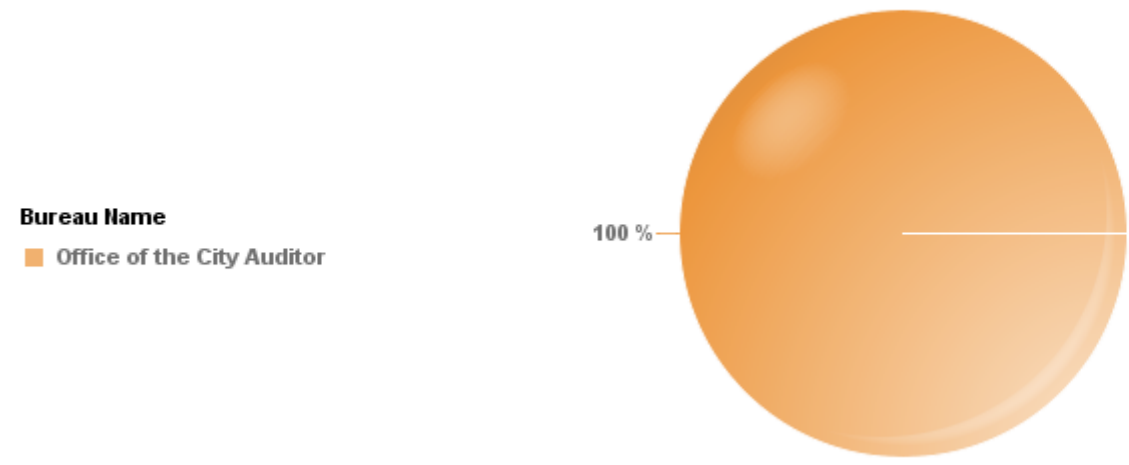
Bureaus are required to submit this coverage with their FY 2024-25 Budget Submission

Run Time: 8:46:53 AM

Office of the City Auditor Service Area

Bureau	FY 2023-24 Adopted Expenditures	FY 2023-24 Adopted FTE	FY 2024-25 Requested Expenses (No DP)
Office of the City Auditor Simone Rede, City Auditor	\$11,206,367	42.00	\$11,889,163
Sum:	\$11,206,367	42.00	\$11,889,163

Office of the City Auditor Service Area



Service Area Overview

Portland has had a City Auditor since 1868 and an elected City Auditor since 1891. As the sixth elected official in Portland’s government, the Auditor is functionally independent of City Council and accountable only to the public.

The Auditor’s Office consists of six divisions. Two divisions have oversight and accountability responsibilities: Audit Services and the Ombudsman. Other divisions support the public’s participation in their government. Archives & Records Management oversees the Portland Archives and Records Center and helps City offices and bureaus meet government records retention requirements. Operations Management provides administrative support across all Auditor’s Office divisions and oversees the Council Clerk. The Elections Division administers City elections and oversees Campaign Finance & Lobbying Regulations. The Hearings Office provides fast, fair, and impartial adjudication of alleged City Code violations.

Significant Issues

The Auditor’s Office has three main priorities for Fiscal Year 2024-25: implementing charter reforms, increasing community voice in our work, and continuing to deliver high-quality services across our portfolio.

Implement Charter reforms

The Office’s highest priority for the Requested Budget is to implement changes to the City’s election system and form of government. Investments are needed for the Council Clerk team to manage a more complex policy-making process involving an expanded Council and the addition of Council committees, which will be held as public meetings. Additional capacity for the Elections Division is required to administer elections (including filing, educating, and regulating a higher number of candidates and elected leaders) and educate voters to rank candidates in order of preference. These critical investments are necessary to promote trust in the democratic process for all residents of Portland—both as candidates are elected, and as elected leaders govern.

Increase community voice in the Office’s work

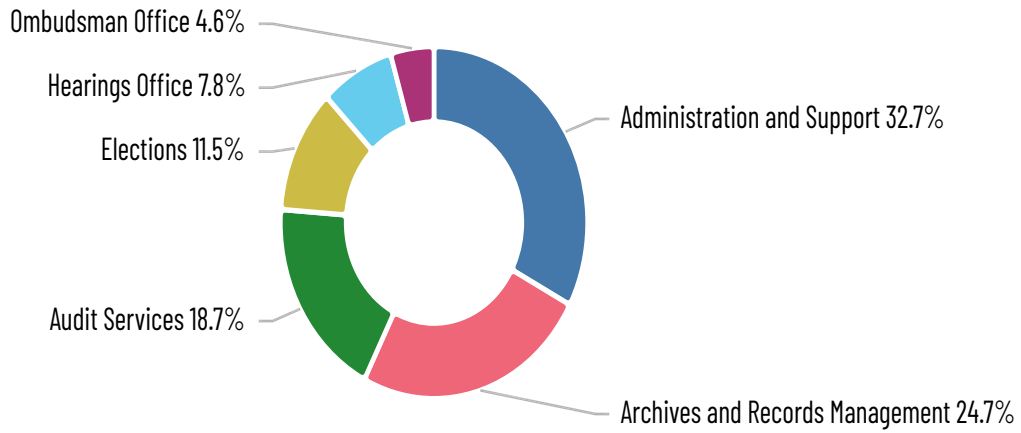
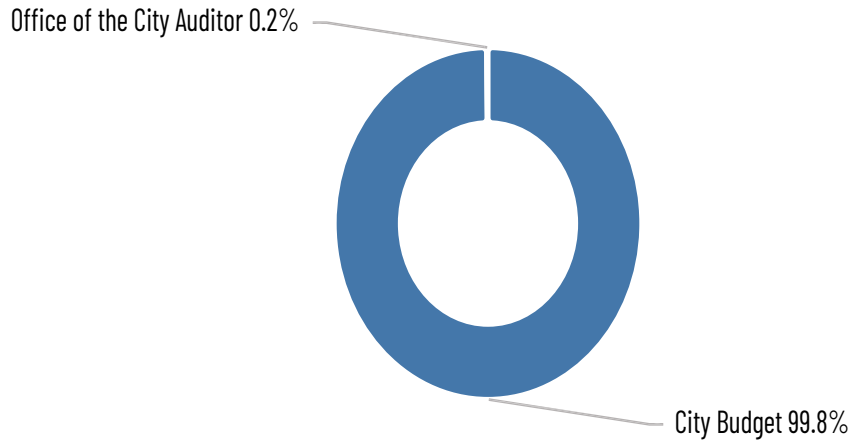
The Office is preparing to fulfill the Auditor’s commitments to gather and use community priorities to guide its work across divisions. The Office will increase public involvement in underserved communities by focusing on anti-racism and equitable access to services and information. Expanded outreach will support these efforts, guided by the Office’s updated Community Engagement Strategy. Public education initiatives will have a heavy focus on voter and candidate education to support the rollout of ranked-choice voting, in partnership with the City’s Transition Team.

Continue to deliver high-quality services

The Office will continue to deliver high-quality services to City government and the public. This includes fulfilling training and records management needs of hybrid employees and responding to concerns and complaints of waste, mismanagement, and unfair treatment. Staff education and professional development will build skills in conducting independent audits and investigations through an anti-racist approach, while planned external reviews will identify improvements in our adherence to Government Auditing Standards and our organizational efficiency and compliance. Records management software will equip the Auditor to support City offices and bureaus in maintaining their records in according with public records laws. The Office’s Communication and Outreach team will be implementing a plain language initiative to improve the accessibility of our website and public-facing materials. Finally, the Office and the people of Portland will continue to benefit from independent legal and policy advice provided by the General Counsel.

Office of the City Auditor

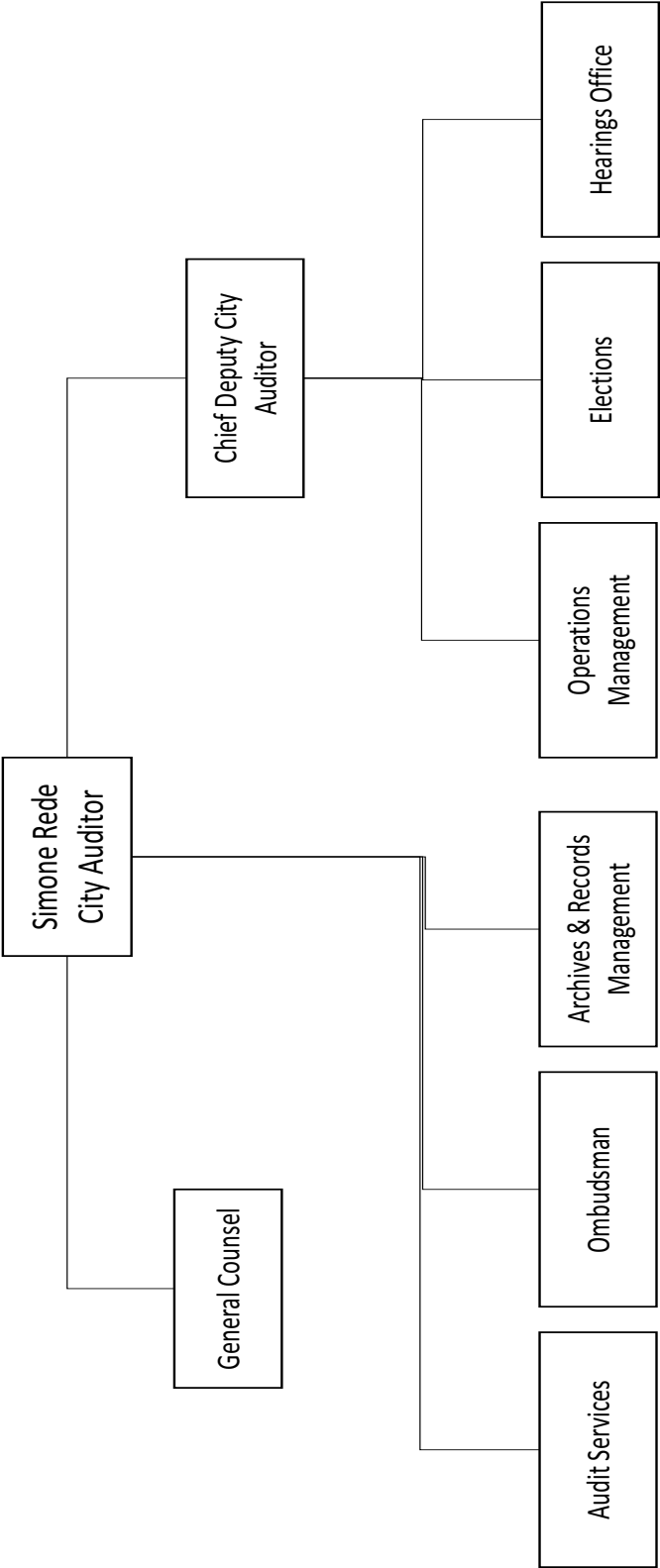
Simone Rede, City Auditor



Bureau Overview

Requirements	Revised FY 2023-24	Requested Total FY 2024-25	Change from Prior Year	Percent Change
Operating	\$11,268,867	\$13,271,156	\$2,002,289	18%
Capital				
Total	\$11,268,867	\$13,271,156	\$2,002,289	18%
Authorized Positions	42.00	47.50	5.50	13.10%

Office of the City Auditor



Bureau Summary
Bureau Summary

Bureau Mission

To ensure open and accountable government by providing independent and impartial reviews, access to public information, and services to City government and the public.

Bureau Overview

Portland has had a City Auditor since 1868 and an elected City Auditor since 1891. As the sixth elected official in Portland’s government, the Auditor is functionally independent of City Council and accountable only to the public.

The Auditor’s Office consists of six divisions. Two divisions have oversight and accountability responsibilities: Audit Services and the Ombudsman. Other divisions support the public’s participation in their government. Archives & Records Management oversees the Portland Archives and Records Center and helps City offices and bureaus meet government records retention requirements. Operations Management provides administrative support across all Auditor’s Office divisions and oversees the Council Clerk. The Elections Division administers City elections and oversees Campaign Finance & Lobbying Regulations. The Hearings Office provides fast, fair, and impartial adjudication of alleged City Code violations.

Base Budget Adjustments

The Auditor’s Office has agreed to take back the Hearings Office, which hears appeals to a variety of City enforcement actions such as vehicle towing and land use permits. The Hearings Office is funded mostly through the general fund, though 23% of revenue comes from IAAs with Bureaus who use its services. The total adjustment of the Hearings Office to the Auditor’s Office base budget is \$976,513, which includes \$223,326 in IAA revenue.

	Actuals FY 2021-22	Actuals FY 2022-23	Revised FY 2023-24	Requested No DP FY 2024-25	Requested Total FY 2024-25
Resources					
External Revenues					
Charges for Services	20,785	9,206	0	0	0
Miscellaneous	2,984	18,574	0	0	0
External Revenues Total	23,769	27,780	0	0	0
Internal Revenues					
General Fund Discretionary	6,235,459	0	4,992,016	5,027,975	5,623,614
General Fund Overhead	4,993,883	0	6,058,882	6,637,862	7,424,216
Fund Transfers - Revenue	93,410	0	0	0	0
Interagency Revenue	171,427	224,284	217,969	223,326	223,326
Internal Revenues Total	11,494,179	224,284	11,268,867	11,889,163	13,271,156
Beginning Fund Balance	500,010	0	0	0	0
Resources Total	12,017,958	252,064	11,268,867	11,889,163	13,271,156
Requirements					
Bureau Expenditures					
Personnel Services	7,536,929	6,073,461	6,489,577	7,220,259	8,026,952
External Materials and Services	898,682	1,048,376	1,819,254	1,571,008	2,071,308
Internal Materials and Services	3,072,419	2,804,811	2,960,036	3,097,896	3,172,896
Bureau Expenditures Total	11,508,031	9,926,648	11,268,867	11,889,163	13,271,156
Ending Fund Balance	596,403	0	0	0	0
Requirements Total	12,104,433	9,926,648	11,268,867	11,889,163	13,271,156
Programs					
Administration & Support	3,640,481	3,625,130	3,970,664	3,890,858	4,345,382
Archives & Records Management	2,518,925	2,714,351	3,012,470	3,284,016	3,284,016
Assessments & Improvements	(0)	89	—	—	—
Assessments, Finance & Foreclosure	5,255	4,599	—	—	—
Audit Services	2,037,552	2,097,806	2,683,370	2,482,165	2,482,165
Council Clerk & Contracts	17,486	14,033	—	—	—
Elections	—	—	—	648,053	1,521,675
Hearings Office	844,282	884,407	948,605	976,513	1,030,360
Independent Police Review	1,994,516	34,933	—	—	—
Ombudsman Office	449,536	551,300	653,758	607,558	607,558
Operations and Maintenance	(2)	—	—	—	—
Total Programs	11,508,031	9,926,648	11,268,867	11,889,163	13,271,156

Office of the City Auditor

Office of the City Auditor

Class	Title	Salary Range		Revised FY 2023-24		Requested No DP FY 2024-25		Requested Total FY 2024-25	
		Min	Max	No.	Amount	No.	Amount	No.	Amount
30003200	Auditor - Administrative Specialist I	44,075	86,838	0.00	0	0.00	0	1.00	70,366
30003201	Auditor - Administrative Specialist II	48,277	110,225	4.00	314,414	2.00	188,947	3.00	277,565
30003204	Auditor - Administrative Specialist III	53,290	121,621	1.00	82,222	1.00	93,517	1.00	93,517
30003205	Auditor - Analyst I	53,290	121,621	1.00	99,778	4.00	348,774	5.00	551,771
30003218	Auditor - Analyst III	69,805	155,525	0.00	0	0.00	0	0.50	125,434
30003202	Auditor - Archives&RecordsCoordinator I	48,277	110,225	1.00	54,600	1.00	84,739	1.00	84,739
30003206	Auditor - Archives&RecordsCoordinator II	53,290	121,621	3.00	247,426	3.00	287,612	3.00	287,612
30003212	Auditor - Archives&RecordsCoordinatorIII	63,336	129,718	2.00	196,799	2.00	218,192	2.00	218,192
30003228	Auditor - Audit Services Director	92,851	200,033	1.00	124,571	1.00	142,314	1.00	142,314
30003213	Auditor - Business Systems Analyst II	63,336	129,718	1.00	103,043	1.00	118,040	1.00	118,040
30003225	Auditor - City Archivist	80,205	172,752	1.00	124,405	1.00	125,424	1.00	125,424
30003229	Auditor - City Auditor Chief Deputy	92,851	200,033	1.00	126,714	1.00	138,174	1.00	138,174
30003226	Auditor - City Ombudsman	80,205	172,752	1.00	131,003	1.00	146,162	1.00	146,162
30003208	Auditor - Clerk to City Council	63,336	129,718	1.00	107,869	1.00	122,470	1.00	122,470
30003203	Auditor - Coordinator I	48,277	110,225	1.00	76,388	0.00	0	0.00	0
30003209	Auditor - Coordinator II	53,290	121,621	1.00	89,419	1.00	96,699	2.00	190,216
30003214	Auditor - Coordinator III	63,336	129,718	1.00	105,830	0.00	0	0.00	0
30003354	Auditor - Coordinator IV	69,805	155,525	0.00	0	1.00	115,752	1.00	115,752
30003232	Auditor - General Counsel	111,696	233,717	1.00	180,565	1.00	194,147	1.00	194,147
30003227	Auditor - Manager I	80,205	172,752	2.00	244,442	2.00	304,616	2.00	304,616
30003210	Auditor - Performance Auditor I	53,290	121,621	1.00	84,292	1.00	93,517	1.00	93,517
30003216	Auditor - Performance Auditor II	63,336	129,718	5.00	531,009	5.00	558,031	5.00	558,031
30003223	Auditor - Performance Auditor III	69,805	155,525	2.00	220,366	2.00	265,200	2.00	265,200
30003217	Auditor - Supervisor I	63,336	129,718	1.00	99,590	1.00	104,562	1.00	104,562
30003224	Auditor - Supervisor II	69,805	155,525	1.00	122,408	1.00	126,339	1.00	126,339
30003576	Auditor – Deputy Council Clerk	63,336	129,718	1.00	87,048	1.00	97,365	1.00	97,365
30003575	Auditor – Deputy Ombudsman	63,336	129,718	2.00	182,832	2.00	215,280	2.00	215,280
30000003	Auditor, City	32,760	136,780	1.00	125,694	1.00	125,694	1.00	125,694
30000028	Hearings Clerk	48,173	84,356	2.00	155,542	2.00	145,111	2.00	145,111
30003451	Hearings Officer, Chief	92,851	199,261	1.00	132,246	1.00	143,021	1.00	143,021
	Total Full-Time Positions			41.00	4,150,515	41.00	4,599,699	45.50	5,180,631
30003205	Auditor - Analyst I	53,290	121,621	0.00	0	1.00	52,614	1.00	52,614

Class	Title	Salary Range		Revised FY 2023-24		Requested No DP FY 2024-25		Requested Total FY 2024-25	
		Min	Max	No.	Amount	No.	Amount	No.	Amount
	Total Limited Term Positions			0.00	0	1.00	52,614	1.00	52,614
30003450	Hearings Officer	69,805	155,525	1.00	54,381	0.00	0	0.00	0
30004001	Hearings Officer - CPPW	69,805	155,525	0.00	0	1.00	58,812	1.00	58,812
	Total Part-Time Positions			1.00	54,381	1.00	58,812	1.00	58,812
Grand Total				42.00	4,204,896	43.00	4,711,125	47.50	5,292,057

Program Offer Summary

Run Date: February 16, 2024

Bureaus are required to submit this document in lieu of the Program Offer Narrative Book, as it is being reconstructed for Charter Cha

Run Time: 11:41:54 AM

Administration & Support

Revenue

	2019-20 Revised Budget	2020-21 Revised Budget	2021-22 Revised Budget	2022-23 Revised Budget	2023-24 Adopted Budget	2024-25 Request - V52 - No DP
General Fund Overhead	\$4,590,251	\$2,010,209	\$2,850,584	\$3,490,851	\$3,550,794	\$2,213,899
General Fund Discretionary	\$6,723,334	\$3,571,773	\$1,977,909	\$2,043,399	\$2,600,837	\$1,676,959
Intergovernmental	\$800	\$0	\$0	\$0	\$0	\$0
Fund Transfers - Revenue	\$0	\$500,000	\$190,579	\$54,947	\$0	\$0
	\$11,314,385	\$6,081,982	\$5,019,072	\$5,589,197	\$6,151,631	\$3,890,858

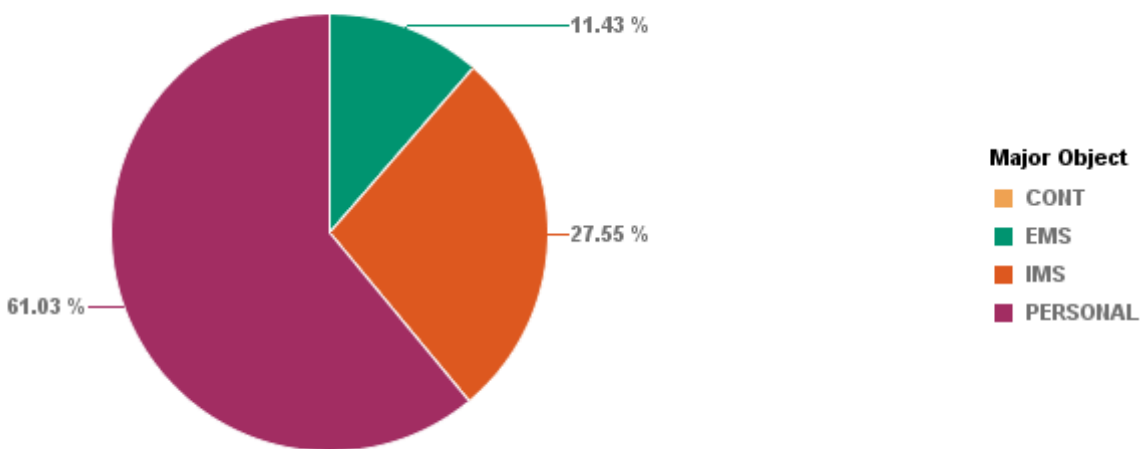
Expense

Personnel	\$1,130,663	\$2,146,765	\$1,694,902	\$2,565,916	\$2,627,873	\$2,374,403
Internal Materials and Services	\$393,551	\$458,027	\$561,620	\$535,280	\$648,450	\$1,071,886
External Materials and Services	\$180,932	\$596,621	\$476,870	\$302,828	\$694,341	\$444,569
Contingency	\$0	\$500,000	\$93,410	\$0	\$0	\$0
	\$1,705,146	\$3,701,413	\$2,826,802	\$3,404,024	\$3,970,664	\$3,890,858

Positions

Full-Time Positions	8.00	15.00	16.00	17.00	17.00	14.00
Limited Term Positions	1.00	1.00	1.00	0.00	0.00	0.00
	9.00	16.00	17.00	17.00	17.00	14.00

FY 2024-25 Base Expenses



Performance Measures	Type	KPM?	PY3 Actuals	PY2 Actuals	PY1 Actuals	FY25 Target	Strat Target
----------------------	------	------	-------------	-------------	-------------	-------------	--------------

No program performance measures	Contextual	NO	N/A	N/A	0	0	0
---------------------------------	------------	----	-----	-----	---	---	---

Program Offer Summary

Run Date: February 16, 2024

Bureaus are required to submit this document in lieu of the Program Offer Narrative Book, as it is being reconstructed for Charter Cha

Run Time: 11:41:54 AM

Archives & Records Management

Revenue

	2019-20 Revised Budget	2020-21 Revised Budget	2021-22 Revised Budget	2022-23 Revised Budget	2023-24 Adopted Budget	2024-25 Request - V52 - No DP
General Fund Overhead	\$0	\$1,051,118	\$1,130,760	\$1,081,984	\$1,188,977	\$1,868,605
General Fund Discretionary	\$0	\$1,599,994	\$1,608,372	\$1,811,208	\$1,821,418	\$1,415,411
Miscellaneous	\$6,000	\$6,000	\$6,000	\$6,000	\$0	\$0
	\$6,000	\$2,657,112	\$2,745,132	\$2,899,192	\$3,010,395	\$3,284,016

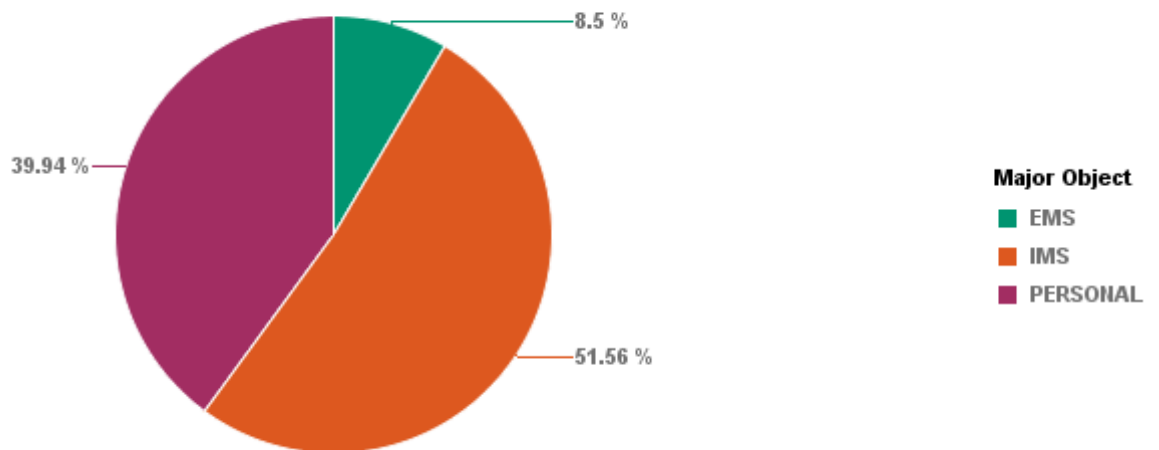
Expense

Internal Materials and Services	\$1,520,670	\$1,454,185	\$1,487,649	\$1,549,014	\$1,633,186	\$1,693,348
Personnel	\$887,659	\$939,764	\$956,243	\$1,110,064	\$1,122,331	\$1,311,513
External Materials and Services	\$240,741	\$224,615	\$301,240	\$240,115	\$256,953	\$279,155
	\$2,649,070	\$2,618,564	\$2,745,132	\$2,899,193	\$3,012,470	\$3,284,016

Positions

Full-Time Positions	7.00	7.00	7.00	8.00	8.00	8.00
	7.00	7.00	7.00	8.00	8.00	8.00

FY 2024-25 Base Expenses



Performance Measures	Type	KPM?	PY3 Actuals	PY2 Actuals	PY1 Actuals	FY25 Target	Strat Target
No program performance measures	Contextual	NO	N/A	N/A	0	0	0

Program Offer Summary

Run Date: February 16, 2024

Bureaus are required to submit this document in lieu of the Program Offer Narrative Book, as it is being reconstructed for Charter Cha

Run Time: 11:41:54 AM

Audit Services

Revenue

	2019-20 Revised Budget	2020-21 Revised Budget	2021-22 Revised Budget	2022-23 Revised Budget	2023-24 Adopted Budget	2024-25 Request - V52 - No DP
General Fund Overhead	\$0	\$0	\$449,318	\$462,000	\$462,000	\$1,412,352
General Fund Discretionary	\$0	\$0	\$0	\$0	\$0	\$1,069,813
Charges for Services	\$100,665	\$100,665	\$100,665	\$0	\$0	\$0
	\$100,665	\$100,665	\$549,983	\$462,000	\$462,000	\$2,482,165

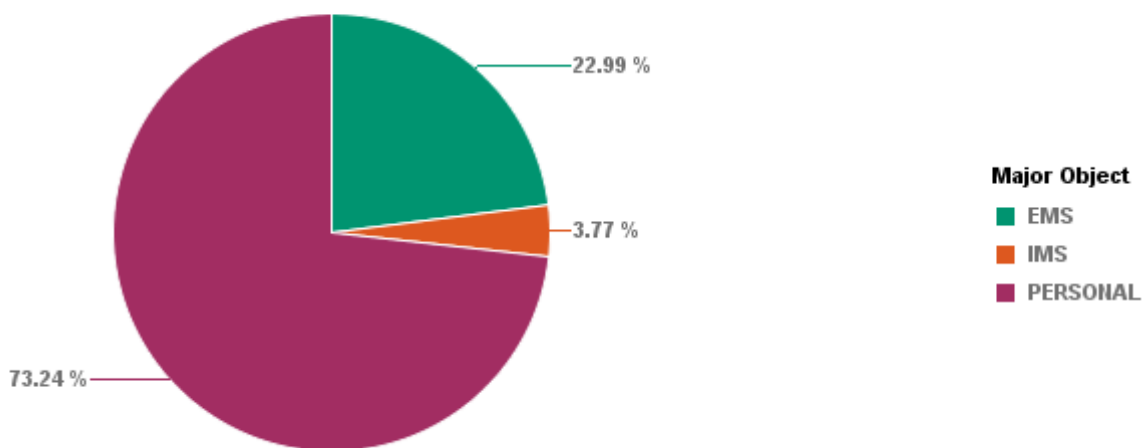
Expense

Personnel	\$1,566,361	\$1,537,644	\$1,565,198	\$1,760,477	\$1,654,586	\$1,817,993
External Materials and Services	\$683,836	\$568,508	\$630,447	\$592,167	\$647,710	\$570,560
Internal Materials and Services	\$258,503	\$298,200	\$283,786	\$295,026	\$338,574	\$93,612
	\$2,508,700	\$2,404,352	\$2,479,431	\$2,647,670	\$2,640,870	\$2,482,165

Positions

Full-Time Positions	11.00	10.00	10.00	10.00	10.00	10.00
	11.00	10.00	10.00	10.00	10.00	10.00

FY 2024-25 Base Expenses



Performance Measures	Type	KPM?	PY3 Actuals	PY2 Actuals	PY1 Actuals	FY25 Target	Strat Target
No program performance measures	Contextual	NO	N/A	N/A	0	0	0

Program Offer Summary

Run Date: February 16, 2024

Bureaus are required to submit this document in lieu of the Program Offer Narrative Book, as it is being reconstructed for Charter Cha

Run Time: 11:41:54 AM

Elections

Revenue

	2019-20 Revised Budget	2020-21 Revised Budget	2021-22 Revised Budget	2022-23 Revised Budget	2023-24 Adopted Budget	2024-25 Request - V52 - No DP
General Fund Overhead	\$0	\$0	\$0	\$0	\$0	\$368,743
General Fund Discretionary	\$0	\$0	\$0	\$0	\$0	\$279,310
	\$0	\$0	\$0	\$0	\$0	\$648,053

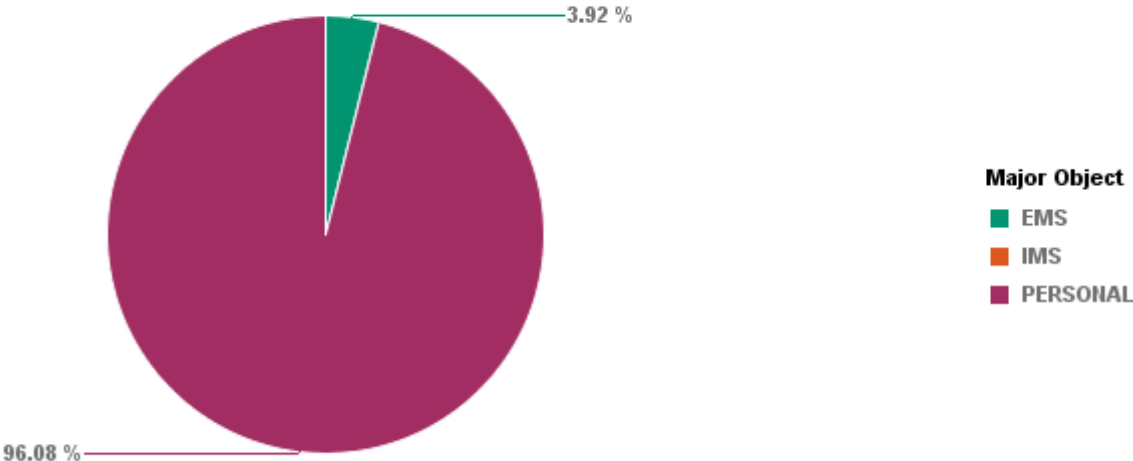
Expense

Personnel	\$0	\$0	\$0	\$0	\$0	\$622,667
External Materials and Services	\$0	\$0	\$0	\$0	\$0	\$25,386
Internal Materials and Services	\$0	\$0	\$0	\$0	\$0	\$0
	\$0	\$0	\$0	\$0	\$0	\$648,053

Positions

Full-Time Positions	0.00	0.00	0.00	0.00	0.00	3.00
Limited Term Positions	0.00	0.00	0.00	0.00	0.00	1.00
	0.00	0.00	0.00	0.00	0.00	4.00

FY 2024-25 Base Expenses



Performance Measures	Type	KPM?	PY3 Actuals	PY2 Actuals	PY1 Actuals	FY25 Target	Strat Target
----------------------	------	------	----------------	----------------	----------------	----------------	-----------------

Program Offer Summary **Run Date:** February 16, 2024
Bureaus are required to submit this document in lieu of the Program Offer Narrative Book, as it is being reconstructed for Charter Cha **Run Time:** 11:41:54 AM

Hearings Office

Revenue

	2019-20 Revised Budget	2020-21 Revised Budget	2021-22 Revised Budget	2022-23 Revised Budget	2023-24 Adopted Budget	2024-25 Request - V52 - No DP
General Fund Overhead	\$0	\$264,564	\$317,554	\$331,368	\$411,245	\$428,563
General Fund Discretionary	\$0	\$450,267	\$344,158	\$418,191	\$299,391	\$324,624
Interagency Revenue	\$210,960	\$212,476	\$211,241	\$190,384	\$217,969	\$223,326
	\$210,960	\$927,307	\$872,953	\$939,943	\$928,605	\$976,513

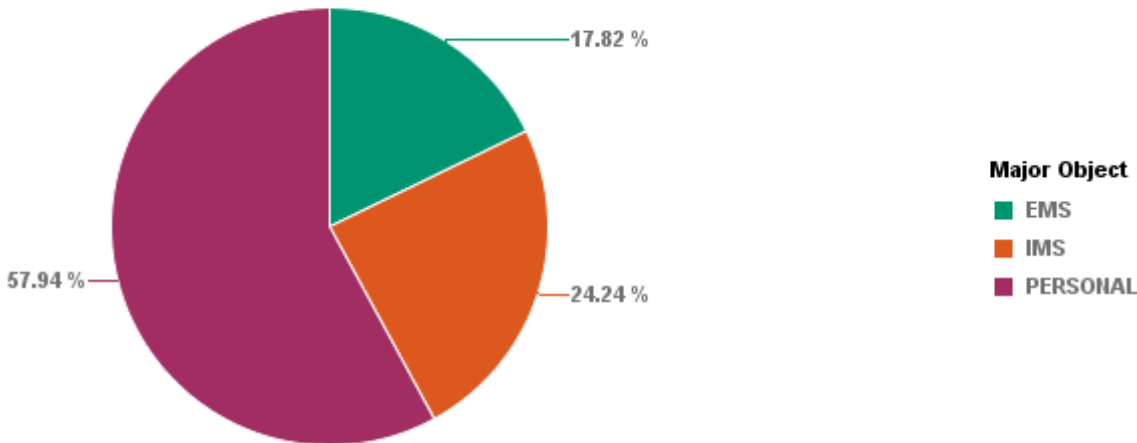
Expense

Personnel	\$521,943	\$462,516	\$495,719	\$582,756	\$604,161	\$565,795
Internal Materials and Services	\$135,791	\$265,465	\$259,130	\$261,412	\$239,719	\$236,710
External Materials and Services	\$240,107	\$199,326	\$118,104	\$95,775	\$84,725	\$174,008
	\$897,841	\$927,307	\$872,953	\$939,943	\$928,605	\$976,513

Positions

Full-Time Positions	4.00	3.00	3.00	3.00	3.00	3.00
Part-Time Positions	0.00	1.00	1.00	1.00	1.00	1.00
	4.00	4.00	4.00	4.00	4.00	4.00

FY 2024-25 Base Expenses



Performance Measures	Type	KPM?	PY3 Actuals	PY2 Actuals	PY1 Actuals	FY25 Target	Strat Target
----------------------	------	------	----------------	----------------	----------------	----------------	-----------------

Program Offer Summary

Run Date: February 16, 2024

Bureaus are required to submit this document in lieu of the Program Offer Narrative Book, as it is being reconstructed for Charter Cha

Run Time: 11:41:54 AM

Ombudsman Office

Revenue

	2019-20 Revised Budget	2020-21 Revised Budget	2021-22 Revised Budget	2022-23 Revised Budget	2023-24 Adopted Budget	2024-25 Request - V52 - No DP
General Fund Overhead	\$0	\$167,756	\$245,667	\$431,835	\$445,866	\$345,700
General Fund Discretionary	\$0	\$255,356	\$339,253	\$190,443	\$207,870	\$261,858
	\$0	\$423,112	\$584,920	\$622,278	\$653,736	\$607,558

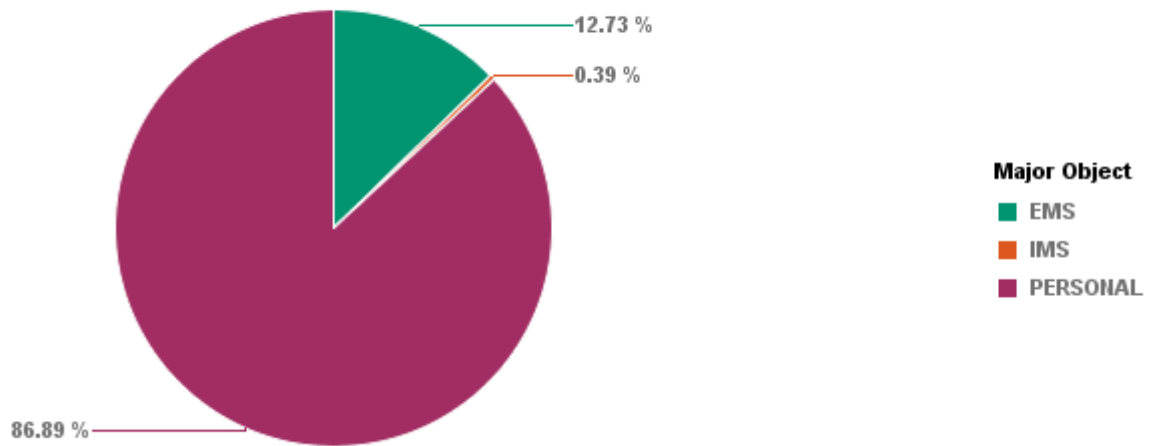
Expense

Personnel	\$320,785	\$333,254	\$477,015	\$519,698	\$480,626	\$527,888
External Materials and Services	\$22,294	\$18,565	\$20,015	\$15,960	\$73,025	\$77,330
Internal Materials and Services	\$43,953	\$57,554	\$87,890	\$86,622	\$100,107	\$2,340
	\$387,032	\$409,373	\$584,920	\$622,280	\$653,758	\$607,558

Positions

Full-Time Positions	2.00	3.00	3.00	3.00	3.00	3.00
	2.00	3.00	3.00	3.00	3.00	3.00

FY 2024-25 Base Expenses



Performance Measures	Type	KPM?	PY3 Actuals	PY2 Actuals	PY1 Actuals	FY25 Target	Strat Target
No program performance measures	Contextual	NO	N/A	N/A	0	0	0

DP: 19483 - FY 2025 Elections Charter-Change Decision Package

DP Type

Priority

New

CHART

0

No

Package Description

Under the new election system approved by voters in November 2022 the Elections Division must make a historical shift in focus. This decision package totals \$1,023,107 million in ongoing funds for community-based voter education services, candidate services, and campaign finance and lobbying regulation. It consists of four permanent full-time equivalent positions and \$490,300 in External Materials and Services (EMS) from the City's General Fund. The personnel match the size and scope of the Division's work, while the EMS provide for community-based voter education services and mailers. The new positions will focus on voter education and outreach, basic candidate services, timely investigations, constituent engagement, responsible contract management, and supporting the overall increased capacity required of the Elections Division as the City adapts to ranked-choice voting and an expanded number of elected officials. These requests reflect the importance of resourcing a responsive, accountable, and independent Elections Division under the new form of government.

Background

The voter-approved Charter changes task the Elections Division with implementing a new election system. These reforms include a switch to ranked-choice voting, election by geographic districts, and serving an expanded number of elected officials. The Charter amendments also require the Elections Division to conduct public education on a routine basis. While the Division has historically served candidates and voters and enforced campaign finance requirements, it has never done so with proactive trainings, comprehensive materials, or equitable public outreach now necessary to ensure participation in City elections. The Division also manages registration and reporting requirements for lobbyists, City officials, and political consultants under City Code Title 2. These accountability functions will be in increased demand with the number of elected City officials more than doubling in size.

This request is informed by the Elections Division's research of jurisdictions across the country with a similar mandate and population.

Personnel

Analyst III

This position will manage voter education services and contracts throughout the election cycle and would be funded starting January 1, 2025. This work will range from drafting, compiling, budgeting, and evaluating RFP procedures to monitoring awards, contract compliance, and deliverables for ranked-choice voting education. This position also serves as lead on candidate education and supervises an Analyst I, leading internship and other elections outreach and education services.

During non-election years, the Analyst III will lead efforts to continuously improve voter education, conducting program evaluation and analyzing voter education strategies and turnout rates alongside City, county, and state partners. They will also lead training and outreach in other regulatory areas of the division, such as lobbying, political consultant, and campaign finance education, needs that will increase with the expansion from 6 to 14 elected officials.

Analyst I

This position will support public outreach and education efforts and would be funded starting January 1, 2025. They will provide materials and learning sessions for candidates and City officials to increase transparency and reduce instances of noncompliance. These services are currently being funded through a temporary realignment of Auditor's Office one-time resources. The position would also oversee an internship program that would further leverage City resources to provide voter education services while supporting workforce development. Following election cycles, the position will also conduct post-election analysis and program evaluation.

Coordinator II

This position will increase the Division's capacity for meaningful community engagement and partnership, in service of equitable voter education. They will focus on building year-round reciprocal relationships with community organizations, improving responsiveness to community and candidate questions, and promoting language accessibility. This position will also add needed graphic design and social media management capacity to the Communications and Outreach team to support Citywide voter education. In between election cycles, this position will build and maintain relationships with community partners and support constituent relations and complaint intake, freeing up capacity for Audit Services, Ombudsman, and Elections staff to conduct audits and investigations. This position is currently funded on a limited duration basis and is set to expire July 1, 2024.

Analyst I

This position is tasked with conducting investigations and providing oversight of campaign finance, lobbying, and political consultant regulations. This includes enforcement of campaign finance requirements that have strict deadlines. This position is necessary to maintain compliance, given that the number of candidates these requirements pertain to are expected to increase significantly with the size of council and number of open positions each elections cycle. This position will also support investigations of alleged lobbying and political consultant violations, as well as assist the Elections Officer with online disclosures, monitoring reports and filings, handling initiative petition filings according to state law and City code, and maintaining accurate program information. This position is currently funded on a limited duration basis and is set to expire July 1, 2024.

Service Impacts

Decision Package Summary

Run Date: 2/20/24

Details

Run Time: 12:00:40 PM

The Division has been allocated no ongoing funding to conduct Charter-required voter education or to serve an expanded Council and provide oversight of campaign finance, lobbying, and political consultant regulations. Without increased staff capacity and resources for voter education services, the City faces the possibility of confusing voters or leaving them without a trusted source of factual information, decreasing public trust in the electoral process. As local and national good-governance, academic, research-based, and civic organizations have reiterated since 2016, without factual information put out by official voices, the void will be filled and weaponized with potentially disastrous impacts.

Without the requested funding, the Division expects that rampant rumors or confusion could overshadow and undermine the outcomes sought by Charter reform, including a more democratic election and representative government. Further, the Division is at serious risk of being in violation of providing Charter-required enforcement of campaign finance requirements, Charter-required voter education services, and Code-required campaign finance and lobbying and regulation. In addition to these legal and reputational risks, candidates, petitioners, voters, and other elections stakeholders will see response times of up to two weeks and the Division would have no capacity to coordinate or produce educational services or materials to support compliance with the City's laws and regulations.

Equity Impacts

This decision package creates a data-informed, equity-focused voter education program that will partner with community-based organizations and non-profit service providers to ensure low-turnout and hard-to-reach voters have the information they need to vote using ranked-choice voting. It also increases the Auditor's Office's capacity for meaningful community engagement by adding one FTE to the Communication and Outreach team that will focus on building year-round reciprocal relationships with community organizations, improving intake processes, and promoting language accessibility in service of robust voter and candidate education.

Failure to fully fund targeted, community-based voter education could further disenfranchise low-turnout and hard-to-reach voters and deepen mistrust among these communities of City government.

This decision package also funds accessible candidate education, which will support under-resourced and non-traditional candidates who are less likely to have access to professional campaign staff or experienced volunteers. This makes the City's new form of government more equitable for all Portlanders.

Budget Detail						
Fund		2024-25 Request - V52 with DP	2024-25 CBO Recommended- V53	2024-25 Proposed-V54	2024-25 Approved - V55	2024-25 Adopted - V56
	Major Object Name	Expense				
100000	External Materials and Servi	490,300	0	0	0	0
100000	Internal Materials and Servic	45,000	0	0	0	0
100000	Personnel	487,807	0	0	0	0
	Sum:	1,023,107	0	0	0	0
	Major Object Name	Revenue				
100000	General Fund Discretionary	440,960	0	0	0	0
100000	General Fund Overhead	582,147	0	0	0	0
	Sum:	1,023,107	0	0	0	0

Position Detail						
Job Class - Name	FTE	Salary	Supplemental	Benefit	Total	
30003205 - Auditor - Analyst I	1.00	202,997	0	93,185	311,712	
30003209 - Auditor - Coordinator II	1.00	93,517	0	44,436	145,107	
30003218 - Auditor - Analyst III	0.50	125,434	0	53,042	188,072	
Total	2.50	421,948	0	190,663	644,891	

DP: 19488 - FY 2025 Council Clerk Charter-Change Decision Package

DP Type

Priority

New

CHART

0

No

Package Description

The Auditor’s Office requests \$305,039 in ongoing General Funds for two permanent, full-time equivalent Administrative Specialist positions to support Council operations for the new form of government as approved by Portland voters in November 2022. The Administrative Specialist I and II positions are new positions to support the increased workload as the City triples its Council members and prepares for the new form of government, including the formation of Council Committees and the expanded, 12-member Council in January 2025.

The Administrative Specialist II position was originally funded in FY 2023-24 as a limited duration position to assist with work related to the transition to the new form of government. The workload increased in FY 2023-24 as the Council Clerk team supported the City’s transition, and it is expected to increase with the addition of Council Committee meetings. The complexity of Council meeting management is expected to increase, and the Administrative Specialist II provides essential customer service support for City staff and the public as they navigate changes to the form of government. The position also supports hybrid Council meetings and Council Committee meetings which will require both in-person and virtual options be made available for community members to participate. Each meeting added to the Council schedule will require a separate agenda to create and publish, agenda items that require review and processing, separate document archiving processes, and minutes preparation. If public testimony and public comment will be heard at Council Committee meetings, as is expected, additional administrative support will be required for the added processes.

The Administrative Specialist I position will support the Council Clerk team, the Elections Division, and staff across the Auditor’s Office. This position will provide critical support to the Council Clerk team, especially during busy times of the City Council schedule, and will be responsible for responding to inquiries from the public by phone, email, and in person, archiving documents related to Council business, maintaining records and online file systems, verifying information in public records documents, and producing minutes for Council meetings. As able, the position will also meet demand across the Auditor’s Office for administrative support associated with a growing staff and expanded programs tied to the Charter transition, including the transfer of the Hearings Office from the Office of Management and Finance. The position will support with a variety of human resource, finance, and procurement functions.

Service Impacts

Without support of the Administrative Specialist positions, the Auditor’s Office will be unable to maintain the level of professional service, responsiveness, and personalized guidance expected by City Elected Officials, bureau staff and the public. Insufficient funding may also limit the new City Council’s ability to set policy and engage with community. Other anticipated service impacts include delayed or diminished ability to make information available to the public and answer questions about Council meetings, agenda, Council documents and Code updates. Accessibility and translation of web material may also be delayed.

Equity Impacts

The Council Clerk’s equity goals include ensuring equitable participation in communications and public testimony at City Council meetings. The Clerk team collects demographic data from public testifiers to determine if there is equitable access for Portlanders who are Black, Indigenous and People of Color. Administrative support is essential to collect and analyze the data and support ways to increase outreach to communities with lower levels of engagement.

Improving accessibility to Council documents is also a priority for the Council Clerk. The agenda management system was designed to be available on all types of devices and is accessible for screen readers. Anticipated equity impacts from the lack of the Administrative Specialist positions include the loss or delay of:

- Outreach to Black, Indigenous and People of Color;
- Web accessibility features;
- Translation of public information to speakers of languages other than English; and
- Collection and analysis of demographic data to monitor progress toward equity goals.

These impacts will disproportionately impact Black, Indigenous, and People of Color, individuals with disabilities, and those with limited access to essential City Council information.

Without additional positions, the Clerk will not be able to ensure all members of the public can engage with City Council.

Budget Detail

Fund	Major Object Name	Expense	2024-25 Request	2024-25 CBO	2024-25	2024-25	2024-25 Adopted
			- V52 with DP	Recommended-V53	Proposed-V54	Approved - V55	- V56
100000	External Materials and Servi		10,000	0	0	0	0
100000	Internal Materials and Servic		30,000	0	0	0	0
100000	Personnel		265,039	0	0	0	0

Decision Package Summary

Budget Detail

Fund		2024-25 Request - V52 with DP	2024-25 CBO Recommended- V53	2024-25 Proposed-V54	2024-25 Approved - V55	2024-25 Adopted - V56
	Major Object Name	Expense				
	Sum:	305,039	0	0	0	0
	Major Object Name	Revenue				
100000	General Fund Discretionary	131,471	0	0	0	0
100000	General Fund Overhead	173,568	0	0	0	0
	Sum:	305,039	0	0	0	0

Position Detail

Job Class - Name	FTE	Salary	Supplemental	Benefit	Total
30003200 - Auditor - Administrative Specialist I	1.00	70,366	0	38,167	113,916
30003201 - Auditor - Administrative Specialist II	1.00	88,618	0	43,109	138,506
Total	2.00	158,984	0	81,276	252,422

Decision Package Summary

Run Date: 2/20/24

Details

Run Time: 12:00:40 PM

DP: 19489 - FY 2025 Hearings Office Decision Package

DP Type

Priority

New

REAL

0

No

Package Description

The Auditor’s Office has agreed to take back the Hearings Office, which hears appeals to a variety of City enforcement actions such as vehicle towing and land use permits. The Hearings Office is funded mostly through general fund resources, but about 23% of revenue comes from Interagency Agreements (IAAs) with Bureaus who use its services. The Auditor’s decision to take back the Office is contingent on two important budget modifications. First, the shift in funding models for the IAAs away from a pay-per-case model, which has already been negotiated with the impacted Bureaus and is reflected in the Requested Budget. Second, Council’s full funding of the costs of the transition, which are anticipated to be \$53,847 in increased personnel and associated costs as the Office’s four represented employees are brought under the American Federation of State, County and Municipal Employees (AFSCME), Local 189 with whom the City shares a collective bargaining agreement.

Service Impacts

This decision package is required to fulfill obligations in a letter of agreement to be signed by AFSCME Local 189 and the City.

Equity Impacts

The Auditor’s Office is seeking to promote parity across represented employees within the Auditor’s Office so that all represented are treated fairly and equitably.

Budget Detail

Fund		2024-25 Request - V52 with DP	2024-25 CBO Recommended- V53	2024-25 Proposed-V54	2024-25 Approved - V55	2024-25 Adopted - V56
	Major Object Name	Expense				
100000	Personnel	53,847	0	0	0	0
	Sum:	53,847	0	0	0	0
	Major Object Name	Revenue				
100000	General Fund Discretionary	23,208	0	0	0	0
100000	General Fund Overhead	30,639	0	0	0	0
	Sum:	53,847	0	0	0	0

Budget Equity Assessment Tool

Office of the Auditor

1. How does your Service Area's requested budget advance the City Core Values of equity and anti-racism? If applicable, please articulate how it ties to strategies and/or outcomes in bureaus' Racial Equity Plans and/or other plans.

Our Requested Budget advances the City Core Values of equity and anti-racism using the Auditor's Office strategic plan as a framework. The plan includes four officewide goals to:

- Become an actively anti-racist organization;
- Build a thoughtful culture of learning and collaboration;
- Build trust and connections with underserved communities;
- Enhance transparency and access for underserved communities.

The Requested Budget continues work along all four goal areas but has focused investments aimed at expanding capacity for community engagement to ensure Black, Indigenous and people of color, immigrants and refugees, and people with disabilities can access, inform, and participate in Auditor Office's services and functions. Other major initiatives that will advance equity include:

- The creation of a data-informed voter education program that will partner with community organizations to educate low-turnout voters on ranked-choice voting.
- Dedicated resources for focus groups and community partnerships to include systemically excluded communities in audit processes, audit topic selection, and systemic reviews conducted by the Ombudsman.

2. How does your Service Area's requested budget support the empowerment of communities that have been systematically excluded and institutionally oppressed?

The Requested Budget supports the empowerment of systemically excluded communities in a few ways. First, it allocates resources for community member stipends and focus groups with community partners to inform service accessibility and provision, and auditing priorities. Second, it creates a data-informed, equity-focused voter education program that will partner with community-based organizations and service providers to ensure low-turnout and hard-to-reach voters have the information they need to vote using the City's new ranked-choice voting process. Third, it increases the Office's capacity for meaningful community engagement by adding one FTE to the Communication and Outreach team that will focus on building reciprocal relationships with community organizations, improving intake processes, and promoting language accessibility – all particularly in service of robust voter and candidate education.

In FY2023-24, the Auditor's Office held multiple focus groups with community members and leaders of community-based organization representing systematically excluded and institutionally oppressed communities to inform service delivery. The Requested Budget sets aside resources to continue this type of engagement.

3. How has your Service Area used qualitative and quantitative data to track program access and service outcomes? Is the data disaggregated? Having disaggregated data is important to determine the benefit or burden on communities. Please provide your data sources.

The Office also collects disaggregated demographic data from a variety of service users, including Ombudsman complainants and researchers who use the City Archives. Work is underway to set standards for demographic data and qualitative data collection to ensure consistent and ethical collection and use.

5. How does your Service Area's requested budget support employees in hiring, retention, and inclusion, particularly for Black people, Indigenous people, people of color, immigrants and refugees, people with disabilities, LGBTQIA2S+, and other people that have systemically excluded and institutionally oppressed? What are the demographics of your Service Area's workforce?

As of October 2023, the Auditor's Office had a workforce that was slightly less racially diverse than Portland as a whole, with 25% of the Office's employees identifying as people of color. Seventy eight percent of the Office identified as female. In FY 2023-24 the Auditor's Office has promoted diversity and equity in hiring by streamlining our application process, standardizing diversity, equity, and inclusion competency questions for applications and interviews, and including staff from community-based organizations who serve underserved communities on hiring panels. Work will continue in FY 2024-25 to expand advertising and outreach to diverse communities, leveraging relationships with community partners, and more deeply integrating (and valuing) lived experience into the hiring process.