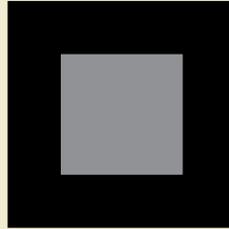
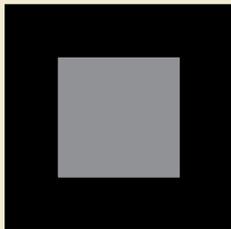
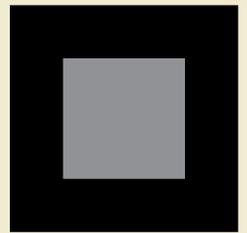
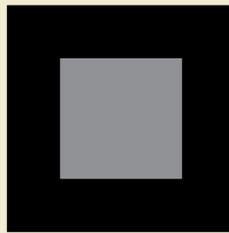
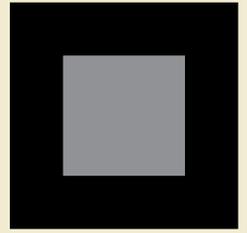
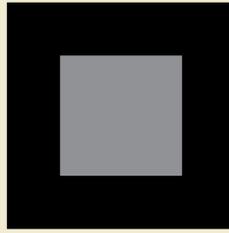
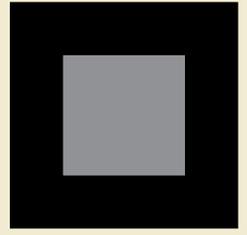


# Requested Budget



*Fiscal Year 2019-20*





Office of Mayor Ted Wheeler  
City of Portland

TO: Commissioner Eudaly  
Commissioner Fish  
Commissioner Fritz  
Commissioner Hardesty  
Auditor Hull Caballero  
City Budget Office

FROM: Mayor Ted Wheeler

DATE: February 4, 2019

SUBJECT: City Budget Office FY 2019-20 Requested Budget

Attached for your consideration is the FY 2019-20 Requested Budget for the City Budget Office. As required, the budget includes a 1% reduction that has been absorbed by the bureau via reductions to various materials and services costs. The bureau is also internally reprioritizing resources to bolster outreach, engagement, and communication efforts with historically and currently underrepresented communities.

Per my direction to develop, included in the budget submission is a new request for \$52,000 to support the increased service contract costs of the new budgeting system. The City Budget Office and finance managers across the City have been supporting the implementation of this new budget system for FY 2019-20, ultimately better equipping the City to efficiently allocate resources to our most pressing needs.

Also included is a request for \$150,000 to support a robust annual Citywide Insights Survey, which would provide Council and bureau leaders with both qualitative and quantitative resident feedback that is critical for informing how best to prioritize City services. Given the scarcity of public dollars and competing needs of our community, having better data is critical in navigating these decisions. Moreover, given CBO's track record of driving data-based decision-making and focus on performance management, I trust that this office is well-fitted for leading the Citywide Insight Survey.

I support this Requested Budget and forward it for your consideration.



Mayor Ted Wheeler

# CITY BUDGET OFFICE

Ted Wheeler, Mayor  
Chloe Eudaly, Commissioner  
Nick Fish, Commissioner  
Amanda Fritz, Commissioner  
Jo Ann Hardesty, Commissioner  
Mary Hull Caballero, Auditor

Jessica Kinard, Interim Director  
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Portland, Oregon 97201  
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## FY 2019-20 Budget Advisory Committee Report

The City Budget Office's Budget Advisory Committee convened on January 18, 2019. The committee members include Rob Fullmer (community member), Jennifer Martinez (community member), Marshall Runkel (Commissioner Eudaly's Office), and Suk Rhee (Office of Community and Civic Life).

The committee reviewed the City Budget Office's (CBO) draft program offer descriptions and then offered suggestions on how to improve CBO's performance measures, program descriptions, and equity strategies and goals. Notably, the committee suggested that CBO budget recommendations be highlighted as a core service in the program offer description and that CBO's coordination of the budget and service level mapping should be highlighted as a key equity strategy for the bureau.

The committee also reviewed CBO's base budget by line item and agreed with CBO's efforts to plan to absorb the 1% reduction across various line items within its materials services budget. The committee also noted that personnel costs make up the vast majority of the office's budget (83%) and that most of the materials and services portion is unavailable for cuts (i.e. rent, technology charges, etc.) The committee also supported CBO's plan to realign \$10,000 from personnel to increase budget outreach, particularly outreach to underserved communities. The committee also suggested that budget outreach also include an explanation of this year's process changes. In addition to the typical budget documents, CBO should consider using other forms of communication, including videos and more engaging graphics and charts.

CBO presented two add packages: 1) ongoing resources of \$52,000 to support the increase service contract costs of the new budgeting system, and 2) ongoing support for the Citywide Insights Survey (0.5 FTE and annual contract costs), providing Council and bureaus with resident feedback on a biannual basis and then qualitative research on particular focus areas in alternating years.

CBO staff explained that the increase in service costs was expected during the procurement of the new software and that this cost of \$112,000 per year will be partially supported by \$60,000 in CBO's base budget. Absorbing the additional \$52,000 would likely require that CBO eliminate a position. The committee strongly supported this request.

The committee also supported the request for ongoing resources for the Citywide Insight Survey, noting the value of longitudinal survey data and that having annual data on residents' perceptions will not only

benefit the City of Portland but organizations throughout the region in understanding the needs of the community. The committee supported the proposed idea of alternating between quantitative and qualitative survey every other year, noting that a qualitative survey allows for nuanced perceptions of different segments of the population. The committee also recognized that survey data will enable bureau leaders to more effectively manage services in addition to providing CBO with additional data to support their recommendations and analysis. Lastly, if funded, the committee suggested that CBO consider how the survey could be best incorporated into Council's and bureau's decision-making in addition to identifying how the data could be most effectively reported out to the public regional partners.

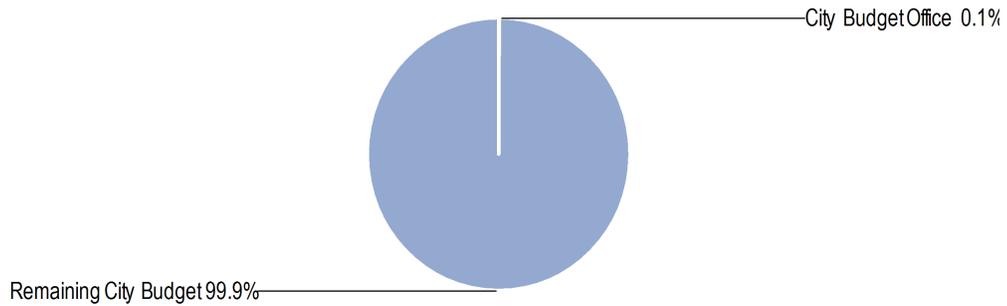
Finally, Director Jessica Kinard sought the committee's advice on how CBO can most effectively support the budget process changes that were implemented as part of the FY 2019-20 budget process. The committee has several key recommendations, including that CBO continually prepare for issues that will arise over the remaining parts of the process. At the end of the budget process, CBO should conduct an evaluation to help understand which aspects of the changes were effective in meeting the goals of the public, bureaus and City Council. While implementing these process changes, the committee also recommended CBO remain committed to its central mission of providing objective, data-driven analysis and being a trusted source on budgetary issues.

The following BAC members unanimously agree to the statements in this report:

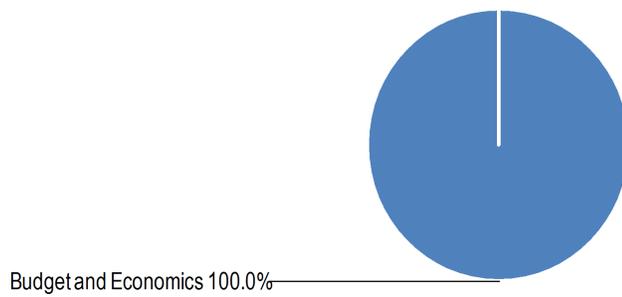
Rob Fullmer, Community Budget Advisor  
Jennifer Martinez, Community Budget Advisor  
Marshall Runkel, Chief of Staff to Commissioner Chloe Eudaly  
Suk Rhee, Director of the Office of Community and Civic Life

# City Budget Office

Percent of City Budget

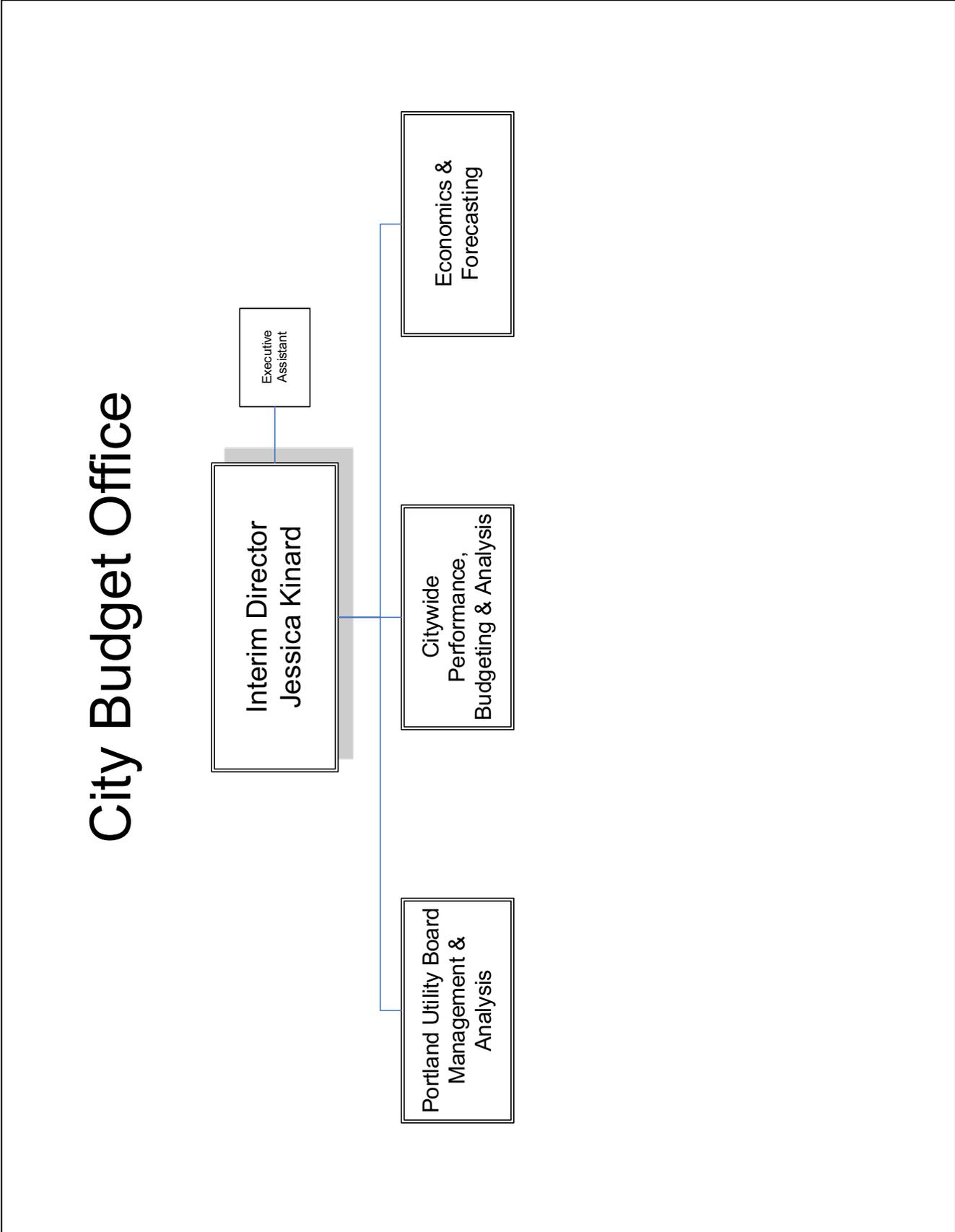


Bureau Programs



Bureau Overview

Requirements	Revised FY 2018-19	Requested FY 2019-20	Change from Prior Year	Percent Change
Operating	2,858,794	2,999,216	140,422	4.91
Capital	1,083,346	0	(1,083,346)	(100.00)
<b>Total Requirements</b>	<b>3,942,140</b>	<b>2,999,216</b>	<b>(942,924)</b>	<b>(23.92)</b>
Authorized Positions	15.00	16.00	1.00	6.67



## **Bureau Summary**

### **Bureau Mission**

The City Budget Office (CBO) provides timely, accurate, and unfiltered information and analysis regarding budgeting, forecasting, and fiscal policy issues to the Mayor, Commissioners, City Auditor, City bureaus, and the public.

### **Bureau Overview**

The City Budget Office's primary function involves coordinating the development of the City's budget, including analysis of each bureau's operating and capital budget, financial plan, and performance measures. Duties include monitoring the expenditure and revenue trends of all City funds throughout the fiscal year, coordinating budget amendments, analyzing City programs and policies, reviewing ordinances for fiscal and policy impacts, and providing fiduciary oversight of the General Fund. In addition to providing analysis to elected officials and the public, analysts are available to City bureaus for consultation, training, and technical assistance in matters related to budget, finance, and performance measurement and management. Analysts conduct research in response to inquiries from elected officials, City bureaus, the media, and the public.

The City Budget Office coordinates public involvement in the budget process, including staff support for the City's Community Budget Advisors and planning and staffing of budget forums and hearings. The office is responsible for ensuring that the City meets all requirements of State Budget Law regarding notices of public hearings and certification of the Approved Budget by the Tax Supervising and Conservation Commission. The Budget Director serves as the City's Budget Officer.

The economics and forecasting section of the office monitors and forecasts General Fund revenues and expenses, publishing five-year financial forecasts in December and April and economic and revenue updates at the close of each quarter. This section develops current appropriation level targets for bureaus and programs that receive General Fund discretionary and General Fund overhead funding. Additionally, this section estimates labor agreement costs, consults on bond rating calls, provides ad hoc economic analyses, and analyzes local business impacts of proposed ordinances. Finally, this section houses the City's representative on the Oregon League of Cities' Finance and Taxation Committee and the State's Property Tax Reform Study Group.

The City Budget Office also houses management and analysis functions for the Portland Utility Board (PUB). The PUB is a community oversight body for the Portland Water Bureau, the Bureau of Environmental Services, and City Council's management of these public utility bureaus.

### **Strategic Direction**

#### **Bureau Goals**

The office focuses its efforts on achieving excellence in four primary areas: effective budget processes; robust budget, policy, and performance analysis; providing clear and concise deliverables for Council and the public that capture analytical and budgetary information; and facilitating informed and transparent decision-making for improved public services.

### **Budget Processes**

A core function of the office is to manage the budget development and budget monitoring processes. The office strives to coordinate processes that:

- ◆ Help the Mayor and Council to address tradeoffs, prioritize spending, and optimize overall value of service to the public with a focus on equitable and sustainable outcomes;
- ◆ Minimize the workload impact on Citywide staff by ensuring that budget processes are efficient; and
- ◆ Ensure that the public is robustly engaged in the decision-making process through readable and informative information and analysis, bureau Budget Advisory Committees, a panel of Citywide Community Budget Advisors, public forums, and a required Approved Budget hearing.

CBO is currently in the process of implementing the City's new budgeting software system. This technology implementation represents a significant opportunity to improve both the efficiency and effectiveness of the City's budget process. Consequently, this implementation has consumed a considerable portion of CBO's effort over the past year and is expected to continue to consume significant staff time through FY 2019-20.

Over the past year, the City Budget Office has been collaborating with the Mayor's Office and stakeholders across the City to implement several changes to the budget process. These changes include the development of program offer budgeting, which allows bureaus to convey the service outcomes for programs within their base budgets. Additionally, CBO has assisted City Council with directing bureaus to create decision packages around specific service outcomes. Lastly, CBO has been collaborating with the Office of Community and Civic Life to create more robust and equitable opportunities for the public to engage in the budget process.

### **Budget, Policy, and Performance Analysis**

The Office strives to have a deep knowledge and understanding of the relevant issues within all City bureaus and the analytical capabilities to evaluate them. The Office has increased its focus on connecting bureau budgets to operations and performance in order to better identify and prioritize the public value of City services, and to identify risks to - and solutions for - providing sustainable levels of service to the public. The bureau has spearheaded various Citywide initiatives towards this end, including the creation and facilitation of Government Accountability, Transparency, and Results (GATR) sessions, which are data-driven executive level management meetings focused on specific topics of interest to the Mayor. Through collaboration and program solving, these sessions track bureau performance against established goals and identify operational solutions to help the City solve its most difficult challenges.

### **Deliverables**

The Office strives to deliver high quality work products to Council (e.g. budget reviews, budget monitoring reports, and special studies) that transform budget and policy analysis into actionable information. This is accomplished by providing concise information and thoughtful analysis, while clarifying the impacts and tradeoffs around key decision-points. This work also supports the public's ability to engage in the budget process by providing information and analysis relevant to the full scope of City activities.

### **Communication**

The Office continues to refine its communication efforts to ensure that CBO analysis and reporting is shared in a way that positively impacts the decision making process. These efforts include, in addition to the bureau's traditional budget reviews, tailored communications to the Mayor and Council extracting and highlighting key issues and insights, performance dashboards that are intuitive and outcome-focused, reports that address specific Citywide issues, and robust engagement with the public through social media.

### **Addressing City Plans**

The Portland Plan includes three action items where CBO is the shared lead with the Bureau of Planning & Sustainability. These action items focus on developing a budget process that incorporates Portland Plan priorities, goals, and measures into the decision making process.

Additionally, bureau analysts review and analyze the construction of and investment requests related to other citywide and bureau-specific plans such as the Climate Action Plan, East Portland Action Plan, and Comprehensive Plan. However, CBO does not have a role in the direct implementation of those plans.

### **Racial Equity Plan**

In 2016, in accordance with Citywide policy, the office adopted a Racial Equity Plan. The plan focuses on achieving four long-term Citywide goals through a series of bureau-specific action items. CBO continues to make progress on the various action items, engaging nearly half the office in implementation leadership. The plan focuses on ensuring diversity in the populations CBO hires, the communities CBO engages in the budget process, and the lens analysts use in recommending investments in services Citywide. More broadly, active implementation of the plan encourages a culture with the office that promotes racial equity as a core value.

## **Summary of Budget Decisions**

### **Adds**

#### **Citywide Insights Survey**

CBO has been directed to develop a proposal for ongoing funds for an annual survey to assess community satisfaction and priorities with regards to City services. This request is for \$150,000 in ongoing General Fund discretionary and overhead resources that would support contract costs and 0.5 FTE.

Currently, the City lacks comprehensive data on resident sentiment and perception of City government and its services. The City also does not have identified avenues to obtain this type of data from community members whose voices are not routinely heard by the City. This large gap in data impacts City Council's ability to identify what community members want in terms of City services. It also impacts bureaus as they lack access to centralized citywide information to inform program decisions and investments.

Access to this type of information on an ongoing basis would inform challenging trade-offs faced by Council regarding budget priorities and bureau management decisions. For example, survey data could provide information about how Portlanders view the City's approach to homelessness and livability. It could also elicit what programs residents are willing to pay more for in the community. The value of this information has been noted in City Council budget work session deliberations and would support City budget process changes to increase transparency, stability, and predictability of the budget process.

CBO received \$60,000 in FY 2018-19, and committed approximately \$40,000 in existing staff resources, to conduct a citywide survey on a one-time basis to replace the survey that had been conducted by the Auditor's Office for more than 20 years. As these resources expire this year, CBO seeks to continue and enhance this project based upon information garnered in this first pilot year of implementation. The proposal's increased funding level is related to the desire have data which provides insight into the priorities and needs of distinct communities - especially historically and currently underrepresented communities. The proposal includes increased contract funding to allow for increased outreach methods, as well as the addition of qualitative survey methods and information to inform Council and bureau decision-making.

### **Ongoing Technical Support for Budget System**

CBO requests \$52,000 in ongoing resources to support the service-level agreement costs of the new budgeting system, Budget Formulation and Management (BFM). Since 2003, the City of Portland Budget Office (CBO) has administered Portland's citywide budget preparation software, BRASS. The citywide budget software is used by all City bureaus to develop, prepare, analyze and share information related to the City's annual budget production process as well as three supplemental budget processes throughout the year.

The implementation of this new budget system for the FY 2019-20 marks a significant transition, supported by the City Budget Office and finance managers across the City, and ultimately better equips the City to efficiently allocate resources to our most pressing needs.

	Actual FY 2016-17	Actual FY 2017-18	Revised FY 2018-19	Requested No DP FY 2019-20	Requested FY 2019-20
<b>Resources</b>					
<b>External Revenues</b>					
<b>Total External Revenues</b>	0	0	0	0	0
<b>Internal Revenues</b>					
General Fund Discretionary	943,997	511,811	1,749,276	1,172,841	1,267,559
General Fund Overhead	1,248,967	1,838,552	1,976,372	1,333,899	1,441,181
Interagency Revenue	185,472	209,434	216,492	290,476	290,476
<b>Total Internal Revenues</b>	<b>2,378,436</b>	<b>2,559,797</b>	<b>3,942,140</b>	<b>2,797,216</b>	<b>2,999,216</b>
Beginning Fund Balance	0	0	0	0	0
<b>Total Resources</b>	<b>\$2,378,436</b>	<b>\$2,559,797</b>	<b>\$3,942,140</b>	<b>\$2,797,216</b>	<b>\$2,999,216</b>
<b>Requirements</b>					
<b>Bureau Expenditures</b>					
Personnel Services	1,927,281	1,978,947	2,426,288	2,325,981	2,389,330
External Materials and Services	239,064	238,333	352,333	252,342	390,993
Internal Materials and Services	212,091	244,072	265,249	218,893	218,893
Capital Outlay	0	0	898,270	0	0
<b>Total Bureau Expenditures</b>	<b>2,378,436</b>	<b>2,461,352</b>	<b>3,942,140</b>	<b>2,797,216</b>	<b>2,999,216</b>
<b>Fund Expenditures</b>					
<b>Total Fund Expenditures</b>	0	0	0	0	0
Ending Fund Balance	0	0	0	0	0
<b>Total Requirements</b>	<b>\$2,378,436</b>	<b>\$2,461,352</b>	<b>\$3,942,140</b>	<b>\$2,797,216</b>	<b>\$2,999,216</b>
<b>Programs</b>					
Budget & Economics	2,378,436	2,461,352	3,942,140	2,797,216	2,999,216
<b>Total Programs</b>	<b>\$2,378,436</b>	<b>\$2,461,352</b>	<b>\$3,942,140</b>	<b>\$2,797,216</b>	<b>\$2,999,216</b>

This table summarizes project expenses by capital programs.

Bureau Capital Program Project	Prior Years	Revised	Requested	Capital Plan				5-Year Total
		FY 2018-19	FY 2019-20	FY 2020-21	FY 2021-22	FY 2022-23	FY 2023-24	
<b>Special Projects</b>								
Budget SW Replacement	0	1,083,346	0	0	0	0	0	0
<b>Total Special Projects</b>	<b>0</b>	<b>1,083,346</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total Requirements</b>	<b>0</b>	<b>1,083,346</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

Class	Title	Salary Range		Revised FY 2018-19		Requested No DP FY 2019-20		Requested FY 2019-20	
		Minimum	Maximum	No.	Amount	No.	Amount	No.	Amount
30003004	Administrative Specialist III	53,290	98,800	1.00	66,870	2.00	144,576	2.00	144,576
30003007	Analyst II	63,336	105,373	1.50	141,081	1.00	98,904	1.50	141,081
30003034	Deputy Director I	80,205	140,338	1.00	125,736	1.00	125,736	1.00	125,736
30003037	Director I	111,696	189,842	1.00	73,298	1.00	135,320	1.00	135,320
30003040	Economist	80,205	140,338	1.00	125,736	1.00	125,736	1.00	125,736
30003054	Financial Analyst I	53,290	98,800	1.00	68,702	3.00	195,165	3.00	195,165
30003055	Financial Analyst II	63,336	105,373	4.00	328,798	4.00	356,797	4.00	356,797
30003056	Financial Analyst III	69,805	126,318	2.50	269,578	2.50	269,578	2.50	269,578
<b>TOTAL FULL-TIME POSITIONS</b>				13.00	1,199,799	15.50	1,451,813	16.00	1,493,990
<b>TOTAL PART-TIME POSITIONS</b>				0.00	0	0.00	0	0.00	0
30003008	Analyst III	69,805	126,318	1.00	69,805	0.00	0	0.00	0
30003054	Financial Analyst I	53,290	98,800	1.00	76,045	0.00	0	0.00	0
<b>TOTAL LIMITED TERM POSITIONS</b>				2.00	145,850	0.00	0	0.00	0
<b>GRAND TOTAL</b>				15.00	1,345,649	15.50	1,451,813	16.00	1,493,990



# Budget & Economics

## Program Description & Goals

The City Budget Office (CBO) provides timely, accurate, and unfiltered information, analysis and recommendation regarding budgeting, forecasting, and fiscal policy issues to the Mayor, Commissioners, City Auditor, City bureaus, and the public. CBO coordinates the development of the City's budget, which includes analyzing operating and capital budgets, financial plans, and performance measures for each City bureau. Duties include monitoring expenditure and revenue trends of all City funds throughout the fiscal year, coordinating budget amendments, analyzing programs and policies, reviewing ordinances for fiscal impacts, providing fiduciary oversight of the General Fund, managing the City's enterprise-wide budget software system, and providing City Council with budget and policy recommendations. CBO strives to support bureaus and ensure that City leaders have relevant, objective analytical information to make informed investment decisions.

CBO's strategic goals include improving processes, analysis, deliverables, recommendations, and communication to positively impact Council decision making and public engagement. CBO works to achieve these goals using an equity lens, including co-managing the Budget Equity Tool with the Office of Equity & Human Rights, providing analysis and recommendations on progress toward Citywide racial and disability equity goals and creating different ways to interact with the City's budget. CBO also engages nearly half of the office in leading implementation of the bureau Racial Equity Plan, focused on ensuring equity, diversity, and inclusion in the populations CBO hires, the communities CBO engages in the budget process, and the lens analysts use in recommending investments in services Citywide.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 YTD Actual	PM 2019-20 Target	Strategic Target
Percentage of City KPMs with positive year-over-year results	45%	21%	N/A	40%	60%
Annual repair, rehabilitation, & replacement funding gap (Citywide)	\$287,900,000	\$310,000,000	N/A	\$310,000,000	0
Customer service rating (4 pt scale)	N/A	3.48	N/A	3.30	3.75
Percentage of GATR action items implemented	80%	82%	N/A	75%	90%
Citywide asset condition summary	72%	67%	N/A	70%	90%
General Fund Excess Ending Balance (forecast accuracy)	\$11,200,000	N/A	N/A	\$10,000,000	\$10,000,000

## Explanation of Services

The majority of CBO staff work on Performance, Budgeting & Analysis functions in the office, coordinating and supporting the City's annual and supplemental budget processes, providing a variety of financial monitoring and analysis services, and managing the Citywide Performance Management program. CBO also provides the City's Economics & Forecasting function, preparing five-year revenue forecasts for each major fund, providing annual General Fund revenue forecasts and Current Appropriation Level (CAL) targets for each City bureau, and providing analysis and advice on other salient economic issues and trends. Additionally, CBO supports the Portland Utility Board (PUB). The PUB is a community oversight body for the Portland Water Bureau, the Bureau of Environmental Services, and City Council's management of these public utility bureaus.

This year, CBO oversaw the solicitation and implementation of a new enterprise budget software system. To enhance customer service and Citywide efficiency, CBO conducted and incorporated significant stakeholder feedback into project development and has provided robust training and support through implementation. CBO has also pursued several improvements to our communication materials and deliverables, adapting financial data to online dashboard visualizations to enhance informational accessibility to the public, and providing tailored briefing materials for members of Council.

Two of CBO's key performance measures relate to addressing the long-term financial risks presented by deteriorating City asset and infrastructure condition. CBO has enhanced the City's focus on achieving a long-term sustainable level of service through support and participation in the Build Portland Initiative, adopted by Council in September 2017. CBO works with City asset managers to reduce the annual repair, rehabilitation, and replacement funding gap, promoting investments that help the City achieve better service levels through improved asset conditions. CBO is unique in its provision of independent, publicly available analyses, which serve to inform and empower the public in critical financial issues facing the City. Additionally, CBO supports a panel of Citywide Community Budget Advisors, and co-hosts – with the Office of Community & Civic Life – budget engagement efforts that include public forums, hearings, and work sessions.

## Equity Impacts

CBO's equity goals focus on ensuring equity, diversity, and inclusion in the populations CBO hires, the communities CBO engages in the budget process, and the lens analysts use in recommending investments in services Citywide. CBO ensures multi-lingual noticing, accessibility and translation services are available at all budget outreach events. However, CBO recognizes the need to take additional measures to empower diverse engagement with the budget process, and as a result is internally reprioritizing \$10,000 within base budget resources to support outreach, engagement, and communication with historically and currently underrepresented communities.

## Changes to Program

CBO managed several major process changes in FY 2018-19, and will focus on evaluating and improving these efforts in FY 2019-20. CBO's Requested Budget is lower in FY 2019-20 due to one-time budget software project funds primarily spent in FY 2018-19. As noted above, CBO is prioritizing \$10,000 in existing resources to bolster our community outreach and engagement efforts especially for historically and currently underrepresented communities.

The Requested Budget also includes an increase of 0.5 FTE associated with the support of the Portland Utility Board (PUB), in response to a memo released by the PUB requesting additional support to carry out the distinct analytical and administrative functions required to support the PUB. The Requested Budget includes a total of 1.5 FTE - a part-time Principal Financial Analyst and a full-time program coordinator – to address these needs, which will be further refined in coordination with the PUB and the Utility bureaus during the budget development process.

## Program Budget

	2016-17 Actuals	2017-18 Actuals	2019 Revised Budget	2019-20 Request - V52 -No DP
<b>Bureau Expense</b>				
Capital Outlay	0	0	898,270	0
External Materials and Services	239,063	238,333	352,333	252,342
Internal Materials and Services	212,092	244,072	265,249	218,893
Personnel	1,927,281	1,978,947	2,426,288	2,325,981
<b>Sum:</b>	<b>2,378,436</b>	<b>2,461,352</b>	<b>3,942,140</b>	<b>2,797,216</b>
	2016-17 Actuals	2017-18 Actuals	2019 Revised Budget	2019-20 Request - V52 -No DP
FTE	15	15	17	16.5
<b>Sum:</b>	<b>15</b>	<b>15</b>	<b>17</b>	<b>16.5</b>

**Resources:** CBO operations are primarily supported by General Fund discretionary and overhead resources. The PUB support function is funded by the utility bureaus.

**Expenses:** The majority of CBO's budget – 83% - is for personnel costs. 9% of the budget funds internal services to support staff and operational costs, and the remaining 8% funds external materials and services associated with core operations, including a Hatfield Fellow and contracts for budget outreach facilitation and translation services.

**Staffing:** CBO's FY 2019-20 base budget includes 16.5 FTE, which includes 1.5 FTE for the Portland Utility Board. CBO is converting an internally-funded limited term Financial Analyst I to permanent to reflect current work practices, which does not affect the total FTE count. In FY 2017-18, CBO budgeted two new limited term positions; one associated with the budget software project will expire this fiscal year. The other, a Citywide Capital Analyst, began work in January 2019 and CBO will be requesting to extended the position into FY 2019-20 at no additional cost to complete their scope of work.

**Assets and Liabilities:** CBO's budget includes costs to partially cover ongoing maintenance of the Citywide budgeting software, the only asset CBO manages. With the need to acquire a new budget system this year, the cost of ongoing service and maintenance of this asset has increased. CBO is seeking \$52,000 in additional resources from Council to cover the increased cost.

## Program Information

**Bureau:** City Budget Office

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

**Website:** cbo/

**Program Contact:** Ryan Kinsella

**Contact Phone** 503-823-6960

City of Portland  
**City Budget Office**  
 Performance Measures

Run Date: 1/29/19  
 Run Time: 4:54:51 PM

	<b>Performance Measure</b>	<b>KPM</b>	<b>Measure Type Name</b>	<b>FY 2016-17 Actuals</b>	<b>FY 2017-18 Actuals</b>	<b>FY 2018-19 YTD Actuals</b>	<b>FY 2019-20 Target</b>	<b>Strategic Target</b>
BO_0001	Percentage of City KPMs with positive year-over-year results	YES	OUTCOME	45%	21%	N/A	40%	60%
BO_0003	Annual repair, rehabilitation, & replacement funding gap (Citywide)	YES	OUTCOME	\$287,900,000	\$310,000,000	N/A	\$310,000,000	0
BO_0005	Customer service rating (4 pt scale)	YES	OUTCOME	N/A	N/A	N/A	3.30	3.75
BO_0007	Percentage of GATR action items implemented	NO	OUTCOME	80%	82%	N/A	75%	90%
BO_0008	CBO budget process work products website views	YES	OUTPUT	42,669	55,990	N/A	50,000	90,000
BO_0009	Citywide asset condition summary	NO	OUTCOME	72%	67%	N/A	70%	90%
BO_0010	General Fund Excess Ending Balance (forecast accuracy)	NO	OUTCOME	\$11,200,000	N/A	N/A	\$10,000,000	0

**DP: 7745 - Ongoing technical support for new budget**

**DP Type**

**Priority**

**New**

ADD

0

Yes

**Package Description**

CBO is requesting \$52,000 in ongoing resources to support the service-level agreement costs of the new budgeting system, Budget Formulation and Management (BFM). Since 2003, the City of Portland Budget Office (CBO) has administered Portland's citywide budget preparation software, BRASS. The citywide budget software is used by all City bureaus to develop, prepare, analyze and share information related to the City's annual budget production process as well as three supplemental budget processes throughout the year. BRASS has been replaced with Budget Formulation Management (BFM), which went live December 7, 2018. The City is currently preparing the FY 2019-20 budget in BFM.

The total contract cost for BFM is \$1.2 Million, and total project costs, including implementation, is approximately \$1.5 Million. CBO's existing budget includes \$60,000 for ongoing service level agreement costs of the budget system, in accordance with the cost of the predecessor system. However, through the RFP process it became clear that ongoing service level costs have increased substantially. The selected vendor, BFM, had one of the lower ongoing service level rates, but costs still exceed the currently budgeted amount by \$52,000 annually, totaling \$112,000 per year. This amount is guaranteed for the next three years per the contract.

**Service Impacts**

The implementation of this new budget system for the FY 2019-20 marks a significant transition, supported by the City Budget Office and finance managers across the City, and ultimately better equips the City to efficiently allocate resources to our most pressing needs. To enhance customer service and Citywide efficiency, CBO conducted and incorporated significant stakeholder feedback into project development and has provided robust training and support through implementation. This is a required expense on behalf of a citywide technology solution. If CBO does not receive ongoing resources to support these costs, we will have to eliminate staffing as 92% of CBO's budget is comprised of personnel costs or internal materials and services costs required to support personnel and operations.

**Equity Impacts**

BFM was configured to accommodate efforts to better incorporate equity considerations into the budget process, such as including fields for bureaus to provide descriptions of how decision packages impact their equity goals and fields for describing how bureau programs advance equity goals. In addition, having a more robust performance management module within the system will allow for more clear connections between how budget decisions impact bureau performance goals, including service goals related to bureaus' equity initiatives.

**Budget Detail**

Fund	Account	2019-20 Request - V52 with DP	2019-20 CBO Recommended- V53	2019-20 Proposed-V53	2019-20 Approved - V54	2019-20 Adopted - V55
<b>Expense</b>						
100000	549000 - Miscellaneous	52,000	0	0	0	0
	<b>Expense Total:</b>	<b>52,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Revenue</b>						
100000	487110 - General Fund Disc	24,388	0	0	0	0
100000	487210 - General Fund Over	27,612.37	0	0	0	0
	<b>Revenue Total:</b>	<b>52,000.37</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<b>Net:</b>	<b>0.37</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**DP: 7785 - Annual Citywide Insight Survey**

**DP Type**

**Priority**

**New**

ADD

0

Yes

**Package Description**

CBO has been directed to develop a proposal for ongoing funds for an annual survey to assess community satisfaction and priorities with regards to City services. Currently, the City lacks comprehensive data on resident sentiment and perception of City government and its services. The City also does not have identified avenues to obtain this type of data from community members whose voices are not routinely heard by the City. This large gap in data impacts City Council's ability to identify what community members want in terms of City services. It also impacts bureaus as they lack access to centralized citywide information to inform program decisions and investments. Access to this type of information on an ongoing basis would inform challenging trade-offs faced by Council regarding budget priorities and bureau management decisions. For example, survey data could provide information about how Portlanders view the City's approach to homelessness and livability. It could also elicit what programs residents are willing to pay more for in the community. The value of this information has been noted in City Council budget work session deliberations and would support City budget process changes to increase transparency, stability, and predictability of the budget process.

CBO received \$60,000 in FY 2018-19 to conduct a citywide survey on a one-time basis to replace the survey that had been conducted by the Auditor's Office for more than 20 years. The entirety of the new one-time funding has gone towards contract costs; in addition, CBO absorbed approximately \$40,000 in staff costs to run the project, predominantly through the dedicated work of a Hatfield Fellow. The FY 2018-19 Community Insights Survey project, launched as a result of this funding, first sought feedback from City bureaus and Council to redesign the City's surveying methodology. This resulted in soliciting survey design, administration, and analysis services from a third-party vendor. Emphasis in this process has been given to developing a survey that is more representative, equitable, and accessible to all Portlanders. This includes provision of the survey in multiple languages, ensuring ADA accessibility, and using survey methods that increase accessibility, such as online surveys. The survey will be administered in March 2019 and involve youth data training and canvassing, surveying in public places, such as community centers and libraries, and tech-enabled methods for data collection. Results and analysis are expected before the end of the Fiscal Year.

In planning for the FY 2018-19 survey, many bureau and Council representatives advocated for additional qualitative approaches to receive community input, such as focus groups, to dive deeper into themes that emerge from the FY 2018-19 survey. Stakeholders also expressed how the previous Auditor's survey was valuable due to its ongoing yearly data to daylight trends in resident perception.

In alignment with this, CBO seeks to expand and continue its Community Insights Project by conducting a quantitative resident survey every other year. In the off-years, CBO will facilitate in-depth qualitative methods for resident feedback, such as issue-specific community workshops on City priority topics. These workshops will address large policy issues in the City and allow a more holistic view of resident priorities than a quantitative survey allows. It will also allow the City to understand how specific communities feel about these topics.

Combined, analysis from both the survey and workshops will help inform Council budget prioritization conversations and improve bureau management. Other jurisdictions, such as Boise, Idaho have implemented similar multi-method approaches. Results in Boise provided community insights that have since shaped the work of the City, and the process helped to educate residents about budget trade-offs.

This year, CBO will utilize the FY 2018-19 survey results expected in May to determine the topics for three community workshops.

Participants will be recruited from survey respondents. These workshops will be hosted in late summer/early fall, so that combined survey and workshop analysis can inform Council budget prioritization conversations in the fall of FY 2019-20. In future years, CBO will build on the FY 2018-19 Community Insights Survey, using many of the same questions and methodologies. This schedule will provide a foundation for incorporating resident feedback into government decision-making. It will also allow the City to test new ideas and methodologies or course correct if a survey engagement strategy is not working. With ongoing resources, there is also the potential for a more formalized partnership for this project between CBO, the Office of Community and Civic Life, and the Bureau of Planning and Sustainability. These bureaus have served as primary stakeholders in the initial redesign of the survey and have subject matter expertise.

**Service Impacts**

This project will improve City budget prioritization, policy making, and the management of City programs as Council and bureaus will have access to yearly quantitative and qualitative data points regarding resident perceptions and priorities. Specifically, the information generated from these ongoing community assessments can be used in decisions regarding public safety, asset management, and prioritization between service areas, among other topics. For example, Portland Fire and Rescue plans to use survey results to help guide the bureau's Blueprint for Success and inform its community health outreach strategies. The Water Bureau plans to use survey results to help guide tradeoffs between capital investments, seismic resiliency, and affordability. In the long-term, this program has the capacity to improve program and service results for the community at large.

In addition, survey and engagement results, especially that received from community workshops, can lead to efficiencies within City bureaus by identifying sentiments and priorities for specific subsets of the population. For example, data could inform how residents from different communities want to be contacted by the City and their preferences for engagement activities. Although bureaus may already conduct bureau or program specific focus groups, these workshops will provide different information due to the citywide focus. This will reduce the need for bureaus to conduct their own individualized surveys or focus groups to receive this information. The result will be an ongoing centralized data source, which can be used by all bureaus.

The unique approaches deployed through this project also show a commitment to community building through partnerships with local universities, training and educational investments in youth canvassers, and the deployment of surveys in historically underrepresented communities.

In the quantitative years, continuation and expansion of this project will allow CBO to further explore approaches aligned with best survey and community engagement practices. These approaches have the possibility of further improve the quality and amount of data the City can rely on for decision-making. Examples of these approaches include:

- Expand the survey to non-residents, including employees working in Portland, students, and the houseless population.
- Institute ongoing recommendations from the consultants hired for the FY 2018-19 survey, such as connecting the survey results to a broader 'listening campaign,' which would use digital tools to monitor resident sentiment and feedback to inform decision making.

**Equity Impacts**

Continuation and expansion of the Community Insights Survey project would enhance equity both in terms of the process, and with the project results.

Regarding the survey process, the expanded project will allow for the implementation of more comprehensive equity strategies surrounding survey design, administration, analysis, and reporting. These strategies include survey methods to increase the representativeness of the survey, ensuring culturally competent and accessible survey and engagement formats, and outreach in historically underrepresented populations. Representativeness will be further supported by more robust canvassing methods and targeted outreach for community workshops. These methods will allow the City to receive feedback and survey results from more respondents, including a wider array of Portlanders, and the city's most vulnerable residents. This structure will allow the City to obtain results at a community-specific level and help to shape City budget, policies, and programs.

Perhaps even more importantly, this project will provide critical information for how the City measures the impact of its equity efforts, including race and disability equity strategies. Survey results can show how specific communities rate the City on their perceived accessibility of the government, ability to influence government decisions, perception of safety, and livability.

Budget Detail						
Fund	Account	2019-20 Request - V52 with DP	2019-20 CBO Recommended- V53	2019-20 Proposed-V53	2019-20 Approved - V54	2019-20 Adopted - V55
<b>Expense</b>						
100000	511100 - Regular (perm full t	42,177	0	0	0	0
100000	514100 - Benefits	8,540	0	0	0	0
100000	514540 - OPSRP (all - swor	6,550	0	0	0	0
100000	514550 - OPSRP pickup (all	2,531	0	0	0	0
100000	514610 - Social security ER	2,615	0	0	0	0
100000	514620 - Medicare ER share	612	0	0	0	0
100000	514700 - TriMet payroll tax	324	0	0	0	0
100000	549000 - Miscellaneous	86,651	0	0	0	0
<b>Expense Total:</b>		<b>150,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Revenue</b>						
100000	487110 - General Fund Disc	70,330	0	0	0	0
100000	487210 - General Fund Over	79,670.06	0	0	0	0
<b>Revenue Total:</b>		<b>150,000.06</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Decision Package Detail**

Details

**Budget Detail**

Fund	Account	2019-20 Request - V52 with DP	2019-20 CBO Recommended- V53	2019-20 Proposed-V53	2019-20 Approved - V54	2019-20 Adopted - V55
	Net:	0.06	0	0		0

**Position Detail**

Job Class - Name	FTE	Salary	Supplemental	Benefit	Total
30003007 - Analyst II	0.50	42,177	0	17,945	63,349
<b>Total</b>	<b>0.50</b>	<b>42,177</b>	<b>0</b>	<b>17,945</b>	<b>63,349</b>

# City Budget Office's Directions to Develop

## FY 2019-20 Requested Budget

**Issue Title:** [Community Insights Survey](#)

**Commissioner(s) Issuing Direction:** Mayor Wheeler and Commissioner Fritz

**Bureau(s) Directed:** City Budget Office

**Issue Overview and Desired Goal/Outcome(s):** The City of Portland is committed to tracking results of its programs and services through performance management. However, the City currently lacks comprehensive data on resident sentiment and perception, especially related to City government and its services. The City also seeks more resident input in Citywide budget prioritization and decision-making processes. Thus, Portland City Council authorized Portland's City Budget Office (CBO) to implement a Citywide resident survey in the Fiscal Year 2018-19.

This new effort to survey Portland residents follows in the history of the City of Portland's long-running Community Survey, which was administered by the City of Portland's Auditor's Office and was last conducted in 2016. The current survey effort will allow the City to explore new and innovative survey approaches and fill the gap in Citywide data resulting from the discontinuation of the Auditor's Community Survey.

The Community Insights Survey aims to:

- Develop a better understanding of Portlanders' perception of City government and services.
- Provide "hard to measure" outcome data for bureaus to assess the impact of programs and services.
- Obtain results that will help inform City Council on resident budget and policy prioritization.

The survey was funded in FY 2018-19 with one-time resources. The City Budget Office is directed develop a proposal for ongoing funds for an annual survey to assess community satisfaction and priorities with regards to City services.

**Funding Options:** New resources.

**Additional Requests/Notes:** none.

**Issue Title:** Citywide Budget Software Maintenance

**Commissioner(s) Issuing Direction:** Mayor Wheeler

**Bureau(s) Directed:** City Budget Office

**Issue Overview and Desired Goal/Outcome(s):** In FY 2016-17, the City Budget Office received one-time project funding to replace the City's aging enterprise-wide budget software system. CBO recently completed project implementation and the new system is being utilized by hundreds of staff across the City to complete the FY 2019-20 budget.

CBO completed comprehensive stakeholder outreach and engagement and a competitive request for proposals process. The proposals submitted all included required ongoing maintenance costs that exceeded CBOs existing budget to support the predecessor system from 2003. The vendor selected was one of the more affordable options, but still requires more ongoing funding to maintain than what CBO currently has in its budget.

CBO is directed to bring forward a proposal as part of FY 2019-20 budget development which ensures the fiscal sustainability, resiliency and success of this enterprise-wide solution.

**Funding Options:** New resources; explore opportunities for efficiency.

**Additional Requests/Notes:** none.

# 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.

## 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?

CBO's Racial Equity Plan focuses on ensuring equity, diversity, and inclusion in the populations CBO hires, the communities CBO engages in the budget process, and the lens analysts use in recommending investments in services Citywide. Staff are also encouraged to regularly participate in equity trainings offered within and outside the City. Additionally, now included within staff evaluations, are questions about how staff contribute to the bureau's racial equity goals. Nearly half of the office is directly involved in implementation of the Racial Equity Plan, and all analysts are expected to utilize an equity lens in carrying out fiscal and policy analysis. CBO continues to prioritize operationalization of equity through the deliverables CBO provides to bureaus, elected officials, and the public. In the FY 2019-20 budget, CBO is also reprioritizing internal resources with the goal of increasing our ability to engage historically and currently underserved populations in budget processes and materials.

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?

The majority of items included in the CBO Racial Equity Plan do not require additional funding to implement but require that staff resources are prioritized to achieve these goals. CBO will be filling several vacancies in the next fiscal year and intends to seek new recruitment channels to ensure that our team has a diversity of skillsets, perspectives, and backgrounds.

3. How does your bureau use quantitative and qualitative data to track program access and service outcomes for different populations?

Wherever possible, CBO endeavors to use disaggregated data in fiscal, policy, and performance analysis and recommendations. CBO works with individual bureaus to help identify opportunities and barriers to collecting meaningful qualitative and quantitative data, and advocates for enterprise-wide support in strengthening collection and use of data to help understand how different populations access and experience City programs and services. CBO plays a key role in the Citywide Open Data Program and Tableau User Group, both of which support Citywide technical and analytical solutions for using data.

In the FY 2019-20 Requested Budget, CBO has been directed to request ongoing resources to support the Community Insights Survey Project, which was launched in FY 2018-19 with one-time resources. The survey will combine quantitative data gathered from resident survey results and qualitative data from issue-specific community workshops to better inform Council and bureau decision-making. These efforts will allow the City to identify sentiment and perception about City government and its services, as well as identify participation and knowledge of City programs.

4. How did you consider the impacts on underserved communities in the development of your budget?

CBO's primarily role is to facilitate development of the Citywide budget. CBO considers the impact of this in two key ways:

First, CBO strives to ensure that equity issues are surfaced in bureau requests, CBO analysis and recommendations, and Council decision-making. To this end, CBO co-manages the Budget Equity Tool with the Office of Equity & Human Rights (OEHR) and worked with OEHR and the Commissioner-in-Charge to incorporate an equity lens in the new program offer budget format. CBO uses this information in developing fiscal and policy recommendations, with the goal of identifying for Council the tradeoffs and equity impacts of budget decisions.

Second, CBO is working with the Office of Community & Civic Life to enhance the ability and opportunity for underserved communities to engage in the budget development process. In addition to process changes, CBO is helping to support this goal by increasing internal resources dedicated to translation and facilitation services.

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?

CBO is reprioritizing \$10,000 within the base General Fund budget to increase support for outreach, engagement, and communication with historically and currently underrepresented communications. Additionally, new staff resources for the Portland Utility Board (PUB), funded through interagency revenue from the utility bureaus, will increase support for the PUB's goals, including outreach to, communication with, and involvement of communities of color.

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)?

CBO's only capital asset is the Citywide budgeting software, BFM. CBO has requested resources for ongoing maintenance of BFM as part of the FY 2019-20 requested budget.

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](#)?

CBO does not own any facilities and does not have a Transition Plan. However, CBO does ensure that the facilities chosen for all budget engagement activities are fully accessible and compliant with ADA Title II.

8. If applicable, how does your bureau's budget create contracting opportunities for disadvantaged, minority, women, and emerging small businesses (D/M/W/ESB)?

CBO has limited external contracts in any given year, but always first contacts D/M/W/ESB entities for any opportunities that arise. CBO generally works with D/M/W/ESB vendors for facilitation of budget engagement.

9. If your bureau has dedicated equity staff, such as an Equity Manager, how were they involved in developing your bureau’s Requested Budget?

As members of a small dynamic office, CBO staff complete many functions and as such, CBO does not have dedicated equity staff. However, approximately half of the office is directly involved in implementation of the Racial Equity Plan, and those employees were involved in the development of the budget and this tool.

**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

Over 90% of CBO’s budget is related to personnel costs. As part of office efforts to integrate equity into our work, several staff are expected to contribute their time to furthering equity goals and enhancing accessibility. The dollar values associated with this dedicated staff time is not currently tracked.

In terms of direct materials and services costs, these resources are primarily related to budget engagement forums:

Facilitation	\$	7,400
Community Engagement Liaisons	\$	4,900
Interpretation	\$	4,600
Flyer and essential document translation	\$	3,200

11. How have community members engaged with your requested budget, including this tool?

CBO shared the draft Requested Budget and Budget Equity Tool with our Budget Advisory Committee prior to submission. CBO also utilizes ongoing feedback from bureaus, Council, and the public to prioritize our workload. Over the last few years, CBO has increased its efforts to provide accessible, engaging, and interactive information online. The feedback we receive from bureaus, Council, and the public help to guide our

workload, as we aim to make our analysis and budget materials more accessible to a wider audience.

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.)

Realigned resources allocated for budget engagement will enhance CBO's ability to engage with and include underrepresented communities in the budget development process, providing increased opportunities for communities to set priorities, provide input, and interact with budget information. New resources for Portland Utility Board staffing will support ongoing work and PUB goals, including those related to community engagement, Board equity training, and recruitment and retention of new members from underserved communities.

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.)

In addition to the budget engagement strategies discussed above, the funding requested for the Community Insights Survey Project will build community capacity and power to engage with the City. The Community Insights Survey Project has been designed to emphasize developing a more representative, equitable, and accessible survey of all Portlanders. The FY 2018-19 project will involve youth data training and canvassing, partnerships with local universities, surveying in public places, such as community centers, and tech-enabled methods for data collection. This approach will allow outreach to historically underrepresented communities and investment in youth data education. Subsequent survey years can build off of this foundation to reach additional populations, such as students and businessowners.

In addition, the community workshop component will allow the City to dive deeper into themes that emerge from the FY 2018-19 quantitative survey data, allowing the City to hear from specific communities about topics important to them. Combined, these efforts will create the ongoing incorporation of resident feedback into government decision-making.

## Identifying Impacts Worksheet

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

Populations Impacted	Potential Positive Impacts	Potential Negative Impacts
Historically and currently underserved communities, including LEP or non-English speaking	Increased ability to interact with budget information and the development process through increased translation and other culturally- and linguistically-specific activities.	

Jane Marie Ford  
Name of Staff Contact

Jessica Kinard  
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.