

Portland, Oregon

## FINANCIAL IMPACT and PUBLIC INVOLVEMENT STATEMENT For Council Action Items

(Deliver original to Financial Planning Division. Retain copy.)

1. Name of Initiator Jack D. Graham		2. Telephone No. 503-823-6953	3. Bureau/Office/Dept. CAO
4a. To be filed (date):  9.13.12	4b. Calendar (Check One)  Regular    Consent    4/5ths <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		5. Date Submitted to Commissioner's office and FPD Budget Analyst:  9.7.12
6a. Financial Impact Section: <input checked="" type="checkbox"/> Financial impact section completed		6b. Public Involvement Section: <input checked="" type="checkbox"/> Public involvement section completed	

**1) Legislation Title:** \*Amend Code to reflect current program operations for the Charitable Campaign (Ordinance; replace Code Chapter 5.10)

**2) Purpose of the Proposed Legislation:** To update Code 5.10 related to the City's annual Charitable Campaign in order to reflect current program operations.

**3) Which area(s) of the city are affected by this Council item? (Check all that apply—areas are based on formal neighborhood coalition boundaries)?**

- |  |                                    |                                    |                                |
|--|------------------------------------|------------------------------------|--------------------------------|
| <input checked="" type="checkbox"/> City-wide/Regional     | <input type="checkbox"/> Northeast | <input type="checkbox"/> Northwest | <input type="checkbox"/> North |
| <input type="checkbox"/> Central Northeast                 | <input type="checkbox"/> Southeast | <input type="checkbox"/> Southwest | <input type="checkbox"/> East  |
| <input type="checkbox"/> Central City                      |                                    |                                    |                                |
| <input type="checkbox"/> Internal City Government Services |                                    |                                    |                                |

### FINANCIAL IMPACT

**4) Revenue:** Will this legislation generate or reduce current or future revenue coming to the City? If so, by how much? If so, please identify the source.

No.

**5) Expense:** What are the costs to the City related to this legislation? What is the source of funding for the expense? (Please include costs in the current fiscal year as well as costs in future years. If the action is related to a grant or contract please include the local contribution or match required. If there is a project estimate, please identify the **level of confidence**.)

None.

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**6) Staffing Requirements:**

- **Will any positions be created, eliminated or re-classified in the current year as a result of this legislation?** *(If new positions are created please include whether they will be part-time, full-time, limited term, or permanent positions. If the position is limited term please indicate the end of the term.)*

No.

- **Will positions be created or eliminated in *future years* as a result of this legislation?**

No.

*(Complete the following section only if an amendment to the budget is proposed.)*

**7) Change in Appropriations** *(If the accompanying ordinance amends the budget please reflect the dollar amount to be appropriated by this legislation. Include the appropriate cost elements that are to be loaded by accounting. Indicate "new" in Fund Center column if new center needs to be created. Use additional space if needed.)*

Fund	Fund Center	Commitment Item	Functional Area	Funded Program	Grant	Sponsored Program	Amount

[Proceed to Public Involvement Section — REQUIRED as of July 1, 2011]

PUBLIC INVOLVEMENT

8) Was public involvement included in the development of this Council item (e.g. ordinance, resolution, or report)? Please check the appropriate box below:

- YES: Please proceed to Question #9.  
 NO: Please, explain why below; and proceed to Question #10.

This is a simple code update to reflect current operations. The public was not involved in this update.

9) If "YES," please answer the following questions:

a) What impacts are anticipated in the community from this proposed Council item?

b) Which community and business groups, under-represented groups, organizations, external government entities, and other interested parties were involved in this effort, and when and how were they involved?

c) How did public involvement shape the outcome of this Council item?

d) Who designed and implemented the public involvement related to this Council item?

e) Primary contact for more information on this public involvement process (name, title, phone, email):

10) Is any future public involvement anticipated or necessary for this Council item? Please describe why or why not.

No.



BUREAU DIRECTOR (Typed name and signature)



**CITY OF PORTLAND**  
OFFICE OF MANAGEMENT AND FINANCE

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Jack D. Graham, Chief Administrative Officer  
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185656

DATE: September 7, 2012

TO: Mayor Sam Adams

FROM: Jack Graham, Chief Administrative Officer

**FOR MAYOR'S OFFICE  
USE ONLY**

RE: **ORDINANCE TITLE** \*Amend Code to reflect current program operations for the Charitable Campaign (Ordinance; replace Code Chapter 5.10)

1. **INTENDED THURSDAY FILING DATE:** September 13, 2012
2. **REQUESTED COUNCIL AGENDA DATE:** September 19, 2012
3. **CONTACT NAME & NUMBER:** Jack Graham, 823.6953
4. **PLACE ON:**  CONSENT  REGULAR
5. **BUDGET IMPACT STATEMENT ATTACHED:**  Y  N  N/A
6. **(3) ORIGINAL COPIES OF CONTRACTS APPROVED AS TO FORM BY CITY ATTORNEY ATTACHED:**  Yes  No  N/A

**7. BACKGROUND/ANALYSIS**

On May 24, 1989, Council approved Ordinance No. 161964 which established City Code Chapter 5.10 governing Payroll Deductions for Charitable Purposes.

City Code Chapter 5.10 was subsequently amended on June 27, 1991 by Ordinance No. 164381, on August 26, 1992 by Ordinance No. 165770, on April 5, 1995 by Ordinance No. 168638, on August 27, 2003 by Ordinance No. 177883, and on December 19, 2007 by Ordinance No. 181483.

These amendments meant that requirements for the charitable organizations were described in several separate sections of Code.

The substitute chapter changes the title from "Payroll Deductions for Charitable Purposes" to "City Charitable Campaign" and is intended to streamline and update the overall Code, clarify requirements by grouping them together, eliminate duplication, remove specific campaign dates from Code, and update payroll deduction language.

Key requirements within the Code would remain in effect, including the requirement for Council authorization of participating umbrella organizations, the requirement for participating umbrella and charitable organizations to have a non-discrimination policy, the requirement for the fundraising and administrative expenses of the umbrella organization to not exceed 25 percent of unrestricted income, and the requirement for the administrative costs of the annual campaign to be paid by the participating umbrella organizations.

**8. FINANCIAL IMPACT**

None.

*An Equal Opportunity Employer*

*To help ensure equal access to programs, services and activities, the Office of Management & Finance will reasonably modify policies/procedures and provide auxiliary aids/services to persons with disabilities upon request.*

**9. RECOMMENDATION/ACTION REQUESTED**

I recommend that you approve this ordinance in order to streamline and update the Code.