

Budget Equity Tool Review

(Check all that apply in each column) – Feel free to add comments

<i>Budget Equity Tool Questions</i>	Expandable	Compatible	Examples of Robust Responses
<p>Requested Budget & Racial Equity Plan Update:</p> <p>QUESTION 1: How does the Requested Budget advance the achievement of equity goals as outlined in the bureau’s Racial Equity Plan?</p> <ol style="list-style-type: none"> 1. In what ways does the Requested Budget benefit Indigenous people, Black people, immigrants and refugees, people of color, and people with disabilities? 2. In what ways does the Requested Budget negatively impact Indigenous people, Black people, immigrants and refugees, people of color, and people with disabilities? <p>BFM Entry: Header Tab, Equity Goals</p>	<p>Equity Goals <input type="checkbox"/></p> <p>Needs to expand to have an equity goal identified for the coming year.</p>	<p>Equity Goals <input type="checkbox"/></p> <p>Includes an equity goal identified for the coming year.</p> <p>Examples:</p>	<p>Equity Goals <input type="checkbox"/></p> <p>1) Has an equity goal identified for the coming year. 2) Goal is realistic - i.e. it is achievable. 3) Goal aligns with Bureau’s Equity work. 4) Goal is identified as supporting internal or external equity efforts. 5) Goal aligns with Strategic Plan.</p> <p>EXAMPLES:</p> <ol style="list-style-type: none"> 1. Continues our progress in recruiting, hiring, and retaining a diverse leadership team and staff. 2. Continues our progress toward offering services in at least English and Spanish. 3. Strengthens our internal capacity to provide accessible and efficient grant administration, track and collect data, and utilize technology in support of all our programs. 4. Maintains and builds upon partnerships with BIPOC-led organizations and communities. 5. Strengthens the impact of our grant programs that are open to the RFP process by prioritizing investments in efforts led by BIPOC leadership and that work to address racial inequities.
<p>Requested Budget Community Engagement:</p> <p>QUESTION 2: How has the bureau engaged with communities in the budget request to identify the priorities, particularly with Indigenous people, Black people, people of color,</p>	<p>Community Priorities <input type="checkbox"/></p> <p>Needs to expand to have community priorities, how it was collected and reflected in the proposed budget.</p>	<p>Community Priorities <input type="checkbox"/></p> <p>Includes community priorities, how it was collected and reflected in the proposed budget.</p>	<p>Community Priorities <input type="checkbox"/></p> <p>1) Includes community priorities; 2) engagement is inclusive; 3) Goals to meet community priorities are clear and realistic; 4) includes budget allocation for community priorities.</p> <p>Examples:</p> <ol style="list-style-type: none"> 1. Our Budget Advisory Committee (BAC) recruited new members, focusing on BIPOC leaders. We have engaged our BAC in budget discussions each month.

<p>immigrants and refugees, multilingual, multicultural, and people with disabilities. How are these priorities reflected in this Proposed Budget?</p> <p>BFM Header Tab, Community Priorities</p>		<p>Examples:</p>	<p>2. Program staff have consulted with key community partners through one-on-one conversations and listening sessions to continually learn about priorities and challenges throughout the year. We have taken this information into consideration when budgeting.</p> <p>3. Our proposed budget shields the programs with the highest impact in BIPOC communities from cuts. We have shielded cuts from our Diversity and Civic Leadership, Constructing Civic Dialogues, Immigrant & Refugee, Disability, and Youth programs.</p> <p>4. 9% of Civic Life staff have served in the Emergency Coordination Center during the COVID-19 response, including five individuals working with the Joint Volunteer Information Center, Aging and Disability and Food Security sections. Significant community feedback and insights have been gained through that experience, including the need to prioritize BIPOC, disability, and immigrant and refugees in our budget investments.</p> <p>5. Due to the lack of significant investment in diverse community and civic engagement networks previously, the bureau must also gather perspectives in different ways. There are many thoroughly researched policy and community priorities such as The People’s Plan, State of Black Oregon, Believe Our Stories and Listen (Portland Street Response survey report), Portland United Against Hate, and more, that inform and shape bureau thinking.</p>
<p>Base Budget Constraints: QUESTION 3: What are the insufficiencies in the base budget that inhibit the Bureau’s achievement of equity or the goals outlined in the Racial Equity Plan?</p>	<p>Constraints to Equity <input type="checkbox"/> Needs to expand to have information about how insufficient funds will inhibit equity goals</p>	<p>Constraints to Equity <input type="checkbox"/> Generally, states impact of insufficient base budget</p>	<p>Constraints to Equity <input type="checkbox"/></p> <p>1) Clearly states impact of insufficient funds in base budget; 2) Identifies dollar amount associated; 3) states the impact on staff; 4) states impact on communities</p> <p>Example answers: Programs specifically focused on equity are understaffed, often run by a single person, and historically have received less budget than other</p>

<p>BFM Entry: Header Tab, Constraints to Equity</p>			<p>programs within the bureau. These programs include our Disability (\$240,433), Immigrant and Refugee (\$220,058), and Youth (\$235,914) programs (FY 2020-21 numbers). Please see Requested Budget by Program FY 20-21 attachment.</p> <p>Programs that receive some of the largest portions of the bureau’s budget have demonstrated inequitable outcomes. Advocacy to sustain these programs without meaningful programmatic change has been effective.</p> <p>Equity and serving diverse constituencies had previously been addressed as an “add-on” to “core” services that do not deliver equitable outcomes.</p>
<p>Notable Changes: QUESTION 4: Have you made significant realignments or changes to the bureau’s budget? If so, how/do these changes impact the community? Is this different for Indigenous people, Black people, immigrants and refugees, people of color, and/or people with disabilities? BFM Header Tab, Impact of Change</p>	<p>Impact of Change <input type="checkbox"/> Needs to expand to have information about changes and impacts of the changes</p>	<p>Impact of Change <input type="checkbox"/> Generally, states change(s) and impacts of the change(s):</p>	<p>Impact of Change <input type="checkbox"/> 1) Clearly states changes; 2) clearly identifies the impacts in general; 3) Specifically states the impacts (positive or negative) on Black people, Indigenous people, people of color, immigrants and refugees, people with disabilities</p> <p>Example: From Crime Prevention to Community Safety, our focus has shifted towards community building and resiliency, rather than patrolling neighborhoods. Working in a "social determinants of community safety" framework, civic engagement will be a common thread across all focus areas, as well as capacity-building around anti-racism and trauma-informed resiliency. The program will also center BIPOC and other marginalized communities through leadership development, youth-led safety initiatives and restorative justice approaches, and safety and resiliency outreach and education.</p>
<p>ADA Title II Transition Plan: QUESTION 5: If applicable, how is funding being prioritized to meet obligations related to Title</p>	<p>Transition Plan <input type="checkbox"/> Needs to expand to have information about</p>	<p>Transition Plan <input type="checkbox"/> Generally, states bureau’s prioritization of</p>	<p>Transition Plan <input type="checkbox"/> 1) Clearly states bureau’s priorities for ADA Title Transition Plan; 2) Includes specific areas of barrier removal; 3) Specifies additional accessibility goals; 4)</p>

<p>II of the Americans with Disabilities Act and the bureau’s Transition Plan barrier removal schedule?</p> <p>BFM Engagement Tab, Transition Plan</p>	<p>how bureau prioritized ADA Title II Transition Plan</p>	<p>ADA Title II Transition Plan.</p> <p>Examples:</p>	<p>Includes strategies or steps to achieve the accessibility goals.</p> <p>Examples:</p>
<p>Accommodations:</p> <p>QUESTION 6: What funding have you allocated in the 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:</p> <ul style="list-style-type: none"> • Funding for translation, interpretation, video captioning, and other accommodations • Translation of essential documents into safe harbor languages • Engagement efforts with multilingual and multicultural communities <p>BFM Engagement Tab, Accommodation Fund</p>	<p>Accommodation Fund <input type="checkbox"/></p> <p>Needs to expand to have information about how the bureau will meet accommodations requirements</p>	<p>Accommodation Fund <input type="checkbox"/></p> <p>Generally, states how the bureau will allocate resources to provide accommodation.</p>	<p>Accommodation Fund <input type="checkbox"/></p> <p>1) Clearly states bureau’s allocation for accommodations; 2) Includes goals for translation, interpretation, video captioning; 3) Specifies funding for translation of essential documents into safe harbor language; 4) Includes accommodations goals for multilingual and multicultural communities.</p> <p>Examples:</p> <p>1.Each program has budgeted for planned translation, interpretation, video captioning, ASL, and other accommodations needs. Planned expenses support accommodations needs for activities such as press conferences, grant requests for proposals, listening sessions, and more.</p> <p>2.In addition to each program budget, Civic Life has a bureau-wide Accommodations Fund to meet unplanned and/or bureau-wide accommodations requests throughout the year.</p>
<p>Hiring, Retention, & Employment Outreach 7:</p> <p>QUESTION: Please take a look at the City of Portland’s workforce demographic dashboard: https://www.portlandoreg.on.gov/oehr/article/59512. How does the bureau’s Requested Budget support employee equity in hiring,</p>	<p>Workforce Equity <input type="checkbox"/></p> <p>Needs to expand to have information about how the budget supports the bureau’s workforce equity goals.</p>	<p>Workforce Equity <input type="checkbox"/></p> <p>Generally, states how the budget supports the bureau’s workforce equity goals, particularly for Indigenous people, Black people, immigrants and</p>	<p>Workforce Equity <input type="checkbox"/></p> <p>1) Clearly states how the budget supports closing workforce disparities, if any, for Indigenous people, Black people, immigrants and refugees, people of color, and people with disabilities; 2) Specifies goals (hiring, retention, and inclusion) to achieve the workforce equity.</p> <p>Examples</p> <p>1.The budget supports professional development opportunities for staff and teams, including staff time dedicated to learning about racial equity and strategies to dismantle racist systems, such as participating in City-</p>

<p>retention, and inclusion, particularly for Indigenous people, Black people, immigrants and refugees, people of color, and people with disabilities?</p> <p>BFM Engagement Tab, Workforce Equity</p>		<p>refugees, people of color, and people with disabilities.</p>	<p>led efforts like the Result Based Accounting training. In addition, each program includes a line item in their budget for professional development.</p> <p>2. Our business operations team supports equitable impacts by playing an integral role in the development and implementation of the bureau’s strategic workforce plan, which seeks to invest in a diverse, multicultural and multilingual team and our ability to provide services in at least English and Spanish. In FY 2019-20, 50.8% of staff identified as Black, Indigenous, and People of Color, which represents more than double the number of BIPOC staff since FY 2016-17. One-hundred percent of supervisors identify as BIPOC, as well as immigrant and refugee and LGBTAQIA+, compared with only 20% in FY 2016-17.</p> <p>Additionally, one of the four new 2020 hires to the bureau in 2020 speaks French and an African language, adding to overall bureau language proficiencies. This demonstrably shows the bureau is moving towards providing service to more community members by having the ability to not only speak and write their language, but also offer programming with culturally specific understanding.</p>
<p>Capital Assets & Intergenerational Equity</p> <p>QUESTION 8: If the bureau has capital assets, how does the Requested Budget take into consideration intergenerational equity (ensuring that those who are currently benefiting from the service are paying for its upkeep versus placing</p>	<p>Future generations <input type="checkbox"/></p> <p>Needs to expand to have information about how capital assets will not create financial burden for future generations</p>	<p>Future generations <input type="checkbox"/></p> <p>Generally, states how capital projects will not create burdens for future generations.</p> <p>Examples:</p>	<p>Future generations <input type="checkbox"/></p> <p>1) Clearly states how capital assets will not create financial burden for future generations; 2) Specifies how current beneficiaries of capital projects will pay for the upkeep of the projects. 3) includes how the capital assets will prevent collateral consequences for future generations.</p> <p>Examples:</p>

<p>the financial burden on future generations)?</p> <p>BFM Engagement Tab: Future Generations</p>			
<p>Contracting Opportunities</p> <p>QUESTION 9: If applicable, how does the bureau's budget create contracting opportunities for disadvantaged, minority, women, and emerging small businesses(D/ M/W/ESB)?</p> <p>BFM Engagement Tab, Contracting Equity</p>	<p>Contracting Equity <input type="checkbox"/></p> <p>Needs to expand to have information about how the bureau creates contracting opportunity for DMWESB</p>	<p>Contracting Equity <input type="checkbox"/></p> <p>Generally, states how the bureau creates contracting opportunities for DMWESB</p>	<p>Contracting Equity <input type="checkbox"/></p> <p>1) Clearly states the amount or extent of contracting opportunities for DMWESB; 2) Specifies goals and steps to creating the opportunities</p> <p>Examples:</p> <p>1. The Graffiti Program will set aside \$100,000 specifically for MWESB vendors to encourage diversifying the small pool of businesses performing graffiti removal services on behalf of the City and in Portland at-large.</p> <p>2.Grants and Contracts Managers also work with Program Supervisors to ensure targeted outreach to MWESB contractors. This also includes removing barriers to the application process where possible.</p>
<p>Equity Manager Role in Budget Development</p> <p>QUESTION 10: If the bureau has dedicated equity staff, such as an Equity Manager, how were they involved in developing the bureau's Requested Budget?</p> <p>BFM Form, Engagement Tab, Equity Managers</p>	<p>Equity Managers <input type="checkbox"/></p> <p>Needs to include or expand to have information about how Equity Managers participated in the budget request</p>	<p>Equity Managers <input type="checkbox"/></p> <p>Generally, states the participation of Equity Managers in the budget request.</p> <p>Examples:</p>	<p>Equity Managers <input type="checkbox"/></p> <p>1) Clearly states the participation of Equity Managers; 2) includes tools developed and/or provided by Equity managers; 3) includes processes organized/led/guided by Equity managers.</p> <p>Examples:</p>
<p>Impacted by Inequities</p> <p>QUESTION 11: How does this budget build capacity within</p>	<p>Community Advice <input type="checkbox"/></p> <p>Needs to expand to have information about</p>	<p>Community Advice <input type="checkbox"/></p> <p>Generally, states how the bureau builds internal</p>	<p>Community Advice <input type="checkbox"/></p> <p>1) Clearly states how the bureau builds internal capacities to engage with communities most impacted by inequities; 2) Specifies the staff capacities to engage the communities; 3) States the different structures and</p>

<p>your bureau to engage with and include communities most impacted by inequities? (e.g., improved leadership for outreach and engagement coordinators, public information or relation officers, advisory committees, commissions, targeted community meetings, stakeholder groups, increased engagement, etc.)</p> <p>BFM, Engagement Tab, Community Engagement</p>	<p>how the bureau builds internal capacities to engage with the communities most impacted by inequities</p>	<p>capacities to engage with communities most impacted by inequities.</p> <p>Examples:</p>	<p>processes used to engage the communities; 3) Provides goals and strategies for increased engagement with communities.</p> <p>Examples:</p> <ol style="list-style-type: none"> 1. This budget supports staffing and program-related expenses to run two advisory bodies, the New Portlanders (Immigrant and Refugee) Policy Commission (NPPC) and the Multnomah Youth Commission (MYC), to engage immigrants, refugees, and youth, the majority of whom are people of color. The NPPC engages up to 25 community members and the MYC up to 40. Members educate elected officials and bureaus, partner with community, and advocate for policy changes based on community priorities. For example, in 2020 the NPPC successfully advocated for the City of Portland to invest \$2 million in the Oregon Worker Relief Fund. The MYC successfully advocated for Portland Public Schools to remove School Resource Officers from their campuses. 2. Supports staffing and program-related expenses to administer the Cannabis Policy Oversight Team (CPOT). CPOT is a team that advises the bureau and City of Portland on policies to deliver cannabis industry diversity, equity, accessibility, and sustainability for the City’s total benefit. CPOT-led discussions surrounding divesting cannabis tax revenue from the Portland Police Bureau and investing into communities most adversely impacted by racially-biased cannabis prohibition. 3. This budget also supports staffing and technology for the Advisory Bodies Committees (ABC), which provides technical assistance, best practices based in equitable community engagement, and recruitment support for advisory bodies across the City. For example, in 2020 the ABC program supported recruitment for the Charter Review Board. In FY 2020-21, we began using NeoGov to run advisory body recruitments and the continued use of this technology will create greater efficiencies and increase the program’s capacity to serve the City.
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<p>Empowering Communities Most Impacted by Inequities</p> <p>QUESTION 12: How does this budget build capacity and power in communities most impacted by inequities? (e.g., leadership development for communities, and guidance from communities, etc.)</p> <p>BFM Engagement Tab, Community Empowerment</p>	<p>Community Empowerment <input type="checkbox"/></p> <p>Needs to expand to have information about how the bureau builds capacity and power in communities most impacted by inequities</p>	<p>Community Empowerment <input type="checkbox"/></p> <p>Generally, states how the bureau builds capacity and power in communities most impacted by inequities.</p> <p>Examples:</p>	<p>Community Empowerment <input type="checkbox"/></p> <p>1) Clearly states how the bureau allocate resources to build capacity and power in communities most impacted by inequities; 2) Specifies the demographics of the communities; 3) Provides the structures and processes used to build capacity and power in communities most impacted by inequities.</p> <p>Examples</p> <p>1. Civic Life grant programs invest resources in building capacity and power among communities most impacted by inequities. These grant programs include the Cannabis program's Social Equity & Educational Development (SEED) Grant, Constructing Civic Dialogues, the Disability Leadership program, and the Diversity and Civic Leadership program.</p> <p>2. The Diversity and Civic Leadership program specifically aims to develop leaders among Portland’s BIPOC communities. Civic Life provides grants to a cohort of BIPOC-led community-based organizations that design and implement yearly leadership development programs that build skills and community engagement to shape city, regional, and state-level policy decisions.3. The SEED Grant aims to expand SEED Initiatives to include as-needed Reimagine Portland support, private-public philanthropic partnerships and local-to-national communication strategy. Funding decisions are informed by the core tenant that the war on drugs has caused disproportionate harm to BIPOC communities. Cannabis-related revenue should be directed into these same</p>

			communities for the purpose of restitution and restoration.
<p>Data Tracking Methodology:</p> <p>QUESTION 13: How does the bureau use quantitative and qualitative data to track program access and service outcomes for different populations? Please provide the data source(s).</p> <p>BFM, Engagement Tab, Performance Data</p>	<p>Performance Data <input type="checkbox"/></p> <p>Needs to expand the bureau's use of quantitative and qualitative data on access and service outcomes for communities</p>	<p>Performance Data <input type="checkbox"/></p> <p>Generally, states the types of bureau's qualitative and quantitative data on program access and service outcomes for different populations along with data sources.</p>	<p>Performance Data <input type="checkbox"/></p> <p>1) Clearly states the types of data; 2) specifies the types of data on contracting; 3) Includes data on community engagement; 4) Includes disaggregated demographic data on program access and service outcomes; 5) includes qualitative and quantitative data; 6) Includes data sources.</p> <p>Examples:</p> <p>1. We collect and analyze grantee narrative and financial reports, which provide both qualitative and quantitative data about who is being served by our grant-funded programs.</p> <p>2. We collect demographic data on applicants to the advisory bodies recruitments to understand the effectiveness of City outreach efforts.</p> <p>3. When possible, we work with expert external partners to generate statistics and reports on specific communities. For example, we sought out (and were selected through a competitive process) research support from use-data provided by the New American Economy to understand disparities experienced by Portland's immigrant and refugee communities during the pandemic. We are also partnering with Portland State University's School of Government and the Real Choice Initiative to conduct the first-ever study of the civic engagement of people with disabilities.</p> <p>4. We use external data such as the census, American Community Survey to understand City and neighborhood demographics and trends. In FY 2019/20, Civic Life provided funds to support an accurate count for the 2020 census, focusing outreach efforts on "hard-to-count" communities.</p>

			<p>5. One bureau-wide performance metric is voter turnout (and participation in local elections), which will eventually be grouped by geography and demography to highlight engagement and disengagement across the City in order to inform programmatic investments.</p>
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