



Community Involvement Committee

To: Chair Jessica Vega Pederson and Board of County Commissioners 8 pages

From: Community Involvement Committee

Date: May 21st, 2024

Subject: County 101 Budget Engagement Subcommittee Recommendations

Background and Process

What is the topic and why did the Community Involvement Committee (CIC) choose this topic?

CIC members met in October 2023 to hear updates from the County and decide on their work for the year. In this meeting members brought ideas to the table and reviewed proposed topics from County offices and departments. CIC members were interested in analyzing how the County informs and engages the community around how the County works. The CIC heard from Ruby Gonzales, Chair Vega Pederson's liaison to the CIC, and Office of Community Involvement director JR Lilly, about the Chair's and OCI's shared priority of improving budget engagement, and other priorities. In the interest of focusing on one part of civic engagement for a "County 101" review of engagement practices, the CIC decided to explore how the County currently engages with the community to elicit input and feedback on decisions that have broad impacts on community members. The committee understood county services as having immediate and individual impacts in the community. Consequently, the process that illustrates the broadest impact is the annual budget, where all services reside. A subcommittee was formed to review the budget process and understand how community involvement is incorporated into critical budgeting decisions. Our subcommittee goals were to:

1. Understand the strategies and tools County departments use to engage the community in the budget process.
2. Provide recommendations to the Board (and OCI) that establish processes and implement tools for community education and engagement throughout the budget process:
 - to inform decision makers in all departments on critical issues, especially budget decisions.

The subcommittee came up with a set of key questions to answer:

- How is the community informed about and educated on the County's budget process? What communications and educational resources are available to the community? How can these be improved?

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- What opportunities exist for the community to engage with the budget, and how are these made available to the public? How can outreach and engagement on the budget be improved?
- What opportunities and tools exist for the community to engage on County decisions in all departments concerning critical issues?
- How can feedback loops be created for Community Advisory Committees, especially CBACs, to receive timely and meaningful feedback on recommendations?
- How can the County ensure Community Advisory Committees have a meaningful role in decision making?

Process:

This subcommittee met eight (8) times between October 2023 and May 2024 to hear from County staff and community partners to better understand the County's budgeting process and how community members are and could be involved in County decision making. The co-chairs attended four (4) additional small group meetings with staff and partners to inform the process.

In our learning process we consulted several organizations and invited presenters to discuss engaging the community during budgeting processes. Those we met with and the topics discussed are listed below:

1. Overview of the Budget Process and opportunities for Community Engagement with Tabitha Jensen (Chair's Office) and JR Lilly (OCI) - November 2023
2. [Presentation](#) on how other agencies do Community Engagement during their budget process from Cathy Sherick (OCI) - December 2023
3. Overview of how the City of Portland Community Involvement Committee & Budget Subcommittee engage the community with Harmonee Dashiell, BPS Equity and Engagement Manager - December 2023
4. Presentation from [Multnomah Idea Lab \(MIL\)](#) on Participatory Budgeting with Steve Van Eck, Mary Li, and Raquel Barajas - January 2024
5. Meeting with Jim Labbe from [Participatory Budgeting Oregon](#) - January 2024
6. Presentation from the [Office of Diversity and Equity \(ODE\)](#) with Joy Fowler, Chief Diversity and Equity Officer - January 2024
7. Updates from County on community engagement for the 2024-25 budget process w/JR Lilly (OCI) and Tabitha Jensen (Chair's Office) - February 2024
8. Updates from Multnomah County Auditor's Office on the [County Budget Process Report](#) with Mark Ulanowicz, Principal Auditor and Sura Sumareh, Management Auditor - March, 2024
9. Meeting with Marcus Mundy, Executive Director and Jenny Lee, Deputy Director from the [Coalition of Communities of Color](#) - April 11, 2024

Subcommittee Co-Chairs: Brian Romer, Jen Mair; **Subcommittee Members:** Angel Brophy, Diego Martinez, Lung Wah Lazum, Patrick Nolen, Richard Barker; **Staff:** KellyAnn Cameron

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Findings and Recommendations

Findings:

1. Multnomah County has some good engagement processes in place, however there are a limited number of community members involved in the community consultation process to inform decision makers.
2. There are barriers and limited access for community members not on an advisory committee or attending Commission meetings to learn more about county decision making and identify ways to provide meaningful input to decision makers. Barriers include language access, familiarity with systems, and limited opportunities, among others. Implementing accessible and culturally responsive pathways for engagement, learning, and feedback submission would benefit decision makers and community members in identifying and implementing shared priorities and goals that reflect the priorities of our diverse County.

Recommendations:

THEME 1: Implement Best Practices for Broad and Diverse Community Engagement on the Budget

1. We recommended that the Chair's Office and Office of Community Involvement (OCI) work together to **design and implement broad scale, regularly occurring, and publicly available community engagement opportunities and standards, which are critical for an effective budget engagement process.** This would require the support infrastructure to include a broad and diverse range of community members to inform decisions (in addition to advisory committees), and to build community capacity for informed engagement.
 - a) Centralize community engagement support infrastructure County-wide such as: County Community Partner lists, tools and mechanisms, trained/hired facilitator list, list of available community meeting spaces, etc..
 - b) Support implementation of "County Community Engagement Best Practices":
 - Work with community partners to invite a broad and diverse range of community members to provide input during regular and ongoing community engagement events and processes, including input on the engagement strategies and processes themselves.
 - Work to identify touch points that already exist with community organizations and members to include community education and engagement opportunities.
 - Include education and information components in all engagement activities to increase civic capacity and support meaningful engagement.
 - Coordinate closely with departments for outreach and communication prior to engagements/town halls/listening sessions with enough lead time to circulate notices and invitations for community members to plan to attend (i.e. 2-4 weeks advance notice via newsletters, emails, and social media with 2-4 reminders).
 - Hold community education and engagement sessions on different days and times to accommodate different schedules. (2024 budget listening sessions are all scheduled for Wednesdays from 6-8pm). We recommend continuing to offer hybrid, in-person, and remote

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options, as well as offering recordings of meetings along with alternate channels to submit input and feedback.

c) Allocate funding and staff or contractors for community engagement sessions described above.

2. Apply community engagement best practices to identify community budget priorities. Implement broad scale Community Engagement processes to identify community priorities on current budget programs and to inform community members on budget decisions and impacts.

a) Hold 4-6 town halls in February-March on budget priorities (i.e. 1 per district + 1-2 virtual) to inform the Chair's proposed budget.

- Include education (budget engagement 101), interactive polls and surveys, as well as deliberative dialogues to identify and discuss tradeoffs.
- Make program offers more accessible and understandable to the public with easy to follow information on how to access and read the centralized website, storymap, visuals, etc.
- Resource: [A Local Official's Guide to Public Engagement in Budgeting](#) - Institute for Local Government

b) Provide feedback on budget hearings via follow up reports and sessions 90 days after budgets are established to review results and continue to inform and educate the community on why/what/how their budget priorities were or were not included, and how to continue to engage in the budgeting process.

c) Allocate funding and staff or contractors for community engagement sessions described above.

3. Apply community engagement best practices to identify other funding priorities beyond the formal budget cycle process. Work with departments to identify pressing budgeting topics and questions to educate on and elicit input from community members.

a) Identify opportunities for engagement with Budget Modifications through the year.

b) Provide space and time for open community engagement sessions to have "deliberative dialogues" on important, pressing topics to the community (e.g. community safety, affordable housing, etc.).

c) Provide education and resources for community members to understand and identify the appropriate authority/jurisdiction and contact for various community issues and concerns.

d) Allocate funding and staff or contractors for community engagement sessions described above.

4. Implement tools to support infrastructure needed for broad scale community education and engagement.

a) Add a budget mapping tool so community members and staff can easily track what funds are going where by program, along with outcomes of spending that include equity impacts, etc.

- Make the inclusion of DEI into program offers and impacts more visible and understandable to the public.

b) Identify easily accessible tools to inform community members on County programs and priorities.

- These tools could include an updated website, story maps, newsletters, social media, etc.

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- Centralize email lists/listserves of engagement opportunities per department OR provide an opportunity/drop down menu of County department and commissioner newsletters to subscribe to when subscribing to the Multnomah County newsletter.
 - Ensure tools are mobile friendly, easy to use, translate into other languages, and easily readable.
- c) Employ tools to elicit broad and diverse community input and feedback (i.e. OpenGov or other survey tools).
- d) Allocate funding and staff for these tools.
- 5. Integrate community input and feedback (qualitative data) into the budget equity tool** to understand the program impacts on the intended community members/ population.
- a) Program offers - leverage contracts and communication with community partners to reach to community members/beneficiaries to better understand service impacts, including equity impacts.
- b) Request departments work with the CIC and OCI to analyze how relationships and touch points with community partners can enhance their ongoing input and feedback collection on County decisions and services.

THEME 2: Increase Effectiveness of Budget and other Advisory Committees

- 6. Implement recommendations in the [Multnomah County Budget Process Audit \(October 2023\)](#) to facilitate more effective CBAC operations.** This recommendation also aligns with [recommendations made by the Central CBAC \(April 2024\)](#).
- a) Increase time CBACs have to advise on budgets to enable more meaningful engagement that includes a deeper understanding of the issues, broader community input on priorities, and more informed budget recommendations.
- i) *Auditor Report Recommendation 3: “The Chair should direct the central budget office and departments to engage community budget advisory committees earlier in the budget process so their comments have more time to be addressed before the release of the Chair’s proposed budget”*
- ii) *Central CBAC Recommendations 2, 3: “As has been demonstrated over multiple fiscal years, departmental and central CBACs cannot adequately carry out their objectives within the current time constraints.”*
- b) Design and employ department and program offer level feedback cycles on adopted versus actual budget expenditures to increase transparency and accountability, as well as to provide timely information and feedback for budget advisory committees, community partners, and community members. Timely information and feedback is critical for informed engagement on budget advisory committees and during public engagement forums and processes.
- i) *Auditor Report Recommendation 1: “the central budget office and Chief Financial Officer should develop an administrative procedure requiring all county departments to report to the Board of County Commissioners at least once each fiscal year on revised budget to actual expenditures at the foundational unit of the county’s budget, which is currently the program offer level.” and affirmed in Central CBAC recommendation 2:*

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“Information on actual expenditures, particularly in relation to the budgets on which the CBACs are tasked with advising, is essential information to CBACs for providing informed budget feedback year over year.”

- ii) Auditor Report Recommendation 2, affirmed in Central CBAC recommendation 2: *“The Board of County Commissioners should develop a policy requiring departments to report to them when they intend to make expenditures in a way that that the Board defines as materially different than how they proposed to spend funds in program offers”*
 - c) Increase the budget cycle to 2 years.
 - i) County Auditor’s Recommendation 4: *“The Board of County Commissioners should study whether the county should budget on an annual or biennial process and report on the results of this study.”*
- 7. Provide easy pathways and touchpoints for CBAC members to regularly hear from community partners** who receive budget allocations and contracts for service delivery so advisory bodies better understand the needs community members and partner organizations have related to services and budgets, as well as the impacts these services have for our communities. CBOs provide reports to the County that include data and outcomes on funding - typically through the procurement & contract systems. This may be an existing “pathway” to information for CBACs and the broader community.
- 8. Establish a quarterly or bi-annual board agenda item that will provide feedback cycles** for all CBACs, as well as the CIC and other advisory bodies, to receive direct feedback on recommendations. This meeting format is where questions can be answered, and a discussion can ensue (rather than only in writing).
- a) Updates will inform successful and not so successful implementation of recommendations.
 - b) Work with CBACs and CIC to increase understanding of how recommendations can be improved for the next cycle of recommendations.

Theme #3 Pilot Future-Forward Community Engagement Programs

- 9. Fund a Community Leadership Academy** to prepare community members to engage with the County more meaningfully and with more information and preparation.
- a) Align program with advisory body processes, recruitment, and participation.
 - b) Support OCI Program #10010D - Civic Engagement Leadership Training for FY2025. This program would create partnerships with local organizations to provide civic education and leadership training for community members. Piloting and potentially laying groundwork for future programs.
 - c) Examples and Resources:
 - [Livermore Community Police Academy](#)
 - [Milwaukee Citizen Academy](#)
 - [Guide to Developing a Citizen’s Academy](#) by Florida League of Cities
 - [Using Citizen Academies to Educate and Engage your Citizenry](#) by Municipal Research and Services Center (MRSC)

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10. Identify a pilot program for Participatory Budgeting, such as a small amount of discretionary money for a specific project (health center, SUN program, etc.) with the goal of exploring the framework for future opportunities for Participatory Budgeting in the County.

a) Example: [King County Participatory Budgeting](#)

Backgrounds and life experiences of subcommittee members:

Jen Mair (she/her), Co-Chair. Jen brings over a decade of experience providing facilitation, public engagement, stakeholder engagement, situation and stakeholder assessment, collaborative strategic planning and process design, and training services to local, regional and state agencies and organizations. She facilitates collaborative decision-making and dispute-resolution processes in many contexts, with extensive experience working in government, corporate, small business, non-profit, and educational environments. She is committed to providing creative platforms for diverse stakeholders to voice their interests and perspectives. Jen grew up in Oregon and has resided in Portland for the last 8 years. Jen's 1st term ends 8/17/2026.

Brian Romer (he/him) Co-Chair. Brian R. is a consulting book editor specializing in science, technology, and the environment. He is a member of the Portland Bureau of Planning and Sustainability's Community Involvement Committee, and works with several nonprofit organizations advocating for city and state climate action. Brian's 1st term ends 8/17/2026

Angel Brophy (she/her) is a Program Coordinator/Data System Specialist with Human Solutions. Angel also volunteers her time to be a Community Health Worker for her Filipino Community to provide wrap-around services with the National Alliance for Filipino Concerns, as well as with the Pacific Coast Coalition for Seafarers. Angel's 2nd term ends 8/24/2026

Diego Martinez (he/him) is a cocktail server at the Love Shack. He has previously interned with the Center for Migration, Gender and Justice and has canvassed for charter reform in Portland and graduated from the University of Portland in 2022. Diego's 1st term ends 8/24/2026

Lung Wah Lazum (he/him) is a Community Health Director of East County Community Health which is an initiative of Rockwood CDC, blends medical and management expertise, having earned a medical degree from the University of Medicine (1), Yangon, and an MBA from George Fox University. He was born and raised in Myanmar (formerly known as Burma) and moved to the US in 2019. He is also a certified community health worker, medical interpreter for the Burmese community, and Community Engagement liaison for Asian communities. His 1st term ends 6/23/2025

Patrick Nolen (he/him) is a volunteer and serves on the board of the Portland Peace Team. In addition he volunteers with the Mental Health Association of Portland. He has previously worked, served on the board and

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organized with Sisters of the Road and other nonprofits. He currently works as a Peer Wellness Support Specialist. Patrick's 1st term ends 9/9/2024

Richard Barker (he/him), is a retired Strategic Customer Consultant for IBM. He's actively involved with the Linnton Neighborhood Association and Neighbors West Northwest, and during his time in California, volunteered for the LA AIDS Project, the Laguna Shanti Project, and the Orange County Gay & Lesbian Community Center. His 2nd term ends 3/10/2025.

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