

CBAC Member Onboarding FY26 - 2024/11/14

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Attendees

Amara Pérez, Amara Pérez's Presentation, Autumn Lillie, Babak Zolfaghari-Azar, Ben Brady, Bill Boyd, Christian Elkin, Christine Hermann, Denell Broncho, Fay Reynolds, Gwyneth W. Punsoni, Ingrid Jacobson, Jeff Renfro, Jeff Renfro's Presentation, Jim Abeles, Jonathan Livingston, Joy Fowler, Katherine Thomas, Katherine Thomas's Presentation, KellyAnn Cameron, Kesean Coleman, Maddelyn High, Madison Riethman, Mallette Faherty, Maria Ramos Diaz, Mike Delman, Nathan Williams, Nicki Dardinger, peter finley fry, Ray Anderson, Renai Bell, T.J. Anderson, Tahira Rivera, Tami Wallis, Terralyn Wiley, Terralyn Wiley's Presentation, Terry J. Harris, Thomas Karwaki, Tia-Theo Thompson, Tim Larson, Yume Delegato

Transcript

Introduction & Ice Breaker

Amara Pérez: recording. All right. on behalf of the Office of Community Involvement, We are so excited to be here with you tonight as we gear up for fiscal year 2026. welcome to the new and returning CBAC members. Welcome to the CBAC coordinators and support staff and all of our colleagues who are going to be presenting tonight. Before we go over the plan for our time together, which is a beautifully packed agenda with presentations from our amazing county leaders, we wanted to get a little sense of who is in the room. So, if you can either find your emoji hand or you want to use your real hand, we're going to do a little exercise that I call wave and be welcome.

Amara Pérez: So, if it applies to you, just wave your emoji hand or your real hand and that way we can get a sense of who here is with a hand already. You Everyone found All right. raise your hand and be welcome if you were born and raised in Portland. All right. Look at those hands go. Lovely. Okay, raise your hand and be welcome if you speak more than one language. I see some All right, Raise your hand and be welcome if you play an instrument. Anybody want to unmute and just say out loud what instrument you play?

- **T.J. Anderson:** I'm a little rusty, but trumpet
- **Amara Pérez:** A rusty trumpet. I love Anyone else? You're the only music player. raise your hand and be welcome if you love to cook. All right, look at that.

Amara Pérez: Raise your hand and be welcome if you love to raise your hand and be welcome if you have never been inside the Molten Noma building. we're going to change that this year. Raise your hand and be welcome if you're a new SEAC member. first time. A big heart and welcome to new folks. And then last one, raise your hand and be welcome if you get energized by working with others to make a change. That's why we're all here tonight. thank you all so much for just sharing a little bit about yourself and being willing to do that. look at all that.

Amara Pérez: So before we actually get into the plan, one more little pop quiz on our collective county knowledge. This is a question of is this Multnomah County? Let's see what we think in terms of Multnomah County programs and services. First one, elections. Is this Multnomah County? I see some yeses. I see. Good. Yes, this is a good one. Water and sewer. Is this Multnomah County? I see a Thumbs up. Nope. That's provided by the city. How about the next one? Road maintenance.

- **peter finley fry:** for county roads.

Amara Pérez: Is this Multnomah County?

Amara Pérez: And yes, Health clinics. Yes. Good job, everybody. Look at all those. Yes. And marriage licenses. Is this the county? it is. Food assistance. Is this Multnomah County? Yes, it The county helps people apply for food stamps and part of the Department of Human Services includes programs and services for seniors and people with disabilities and veterans. Portland police is this Multnomah County. Yeah, good one. Good one. Nope. Not.

Amara Pérez: We do have Multnaga County Sheriff though. all right. And let's get to our agenda. Thank you for just doing that little pop quiz. Hopefully, we all learned something new. So, on our agenda for tonight, first we're going to hear some welcoming words from the chair who couldn't be here tonight, but has sent a video for us. And then I will talk for just a couple minutes a little bit about the CBAC and a little more about the county. And then Katherine Thomas will be here from the county attorney office. We'll talk a little bit more about public meetings, records, ethics. Then we have the equity and the county budget, which is Joy Fowler, chief diversity equity officer, and Terara Lynn Wy, who is a senior equity and inclusion policy analyst. And then the budget process and forecasting. Christian Elen, the county budget director, and Jeff Renro, the economist, who's going to be here to answer all of our questions related to the budget process. and then we'll end with a link giving you some resources and any final questions and then we'll be done. So, this is our plan. So, let's start with a few words from our chair.

Welcome from Multnomah County Chair Jessica Vega Pederson

Amara Pérez's Presentation: Hello, I'm Multnomah County Chair Jessica Vega Peterson and I'm so thrilled to welcome you to Multnomah County's Community Budget Advisory Committee. Whether this is your first time participating in the county CBAC or you are a returning member, thank you so much for your service. As CBAC members, your work is an essential part to the county's budgeting process. I often talk about the ways that a budget is a moral document. It is also a critical feedback loop between this community and your government, one that our board of county commissioners and I take very seriously. Seebucks are one of the key ways the county receives community feedback. You represent your community's priorities at important tables in our departments and more generally help us service the community's most pressing needs and concerns. Over the last six months, my office has worked closely with our Office of Community Involvement or OCI to improve the county's policies and practices around community budget advisory committees.

We are feeling excited about these changes and the ways they will better support our communities and your engagement and ability to share priorities with us. That is why your commitment is so valuable. Moving forward, my staff will work closely with OCI to ensure we're proactively communicating key timelines and milestones so that we move into our next budget cycle with clarity, consistency, accountability, and deeper community engagement. As we approach the eve of another budget process,

I'm confident that the feedback you will be sharing will bring the improvements needed for deeper engagement and a more meaningful experience. I look forward to your work and thank you so much.

Background:

Amara Pérez: So, we are sharing her enthusiasm about this year and your leadership. Just a reminder, this is a snapshot of Multma County elected leadership. As you know, in the coming months, we will have three Commissioners. Brim Edwards will remain for district three, but the other districts will see new leadership. So, District 1, Megan Moyer will replace Commissioner Meyn. District 2, Shannon Singleton will replace Commissioner Bon. And District 4, Vince Jones Dixon will replace Commissioner Stegman.

What's exciting about this is that for many of our commissioners, this will be their first budget cycle process with the county, too. So, you all are a very special cohort to be joining this new leadership team. And then these are other key elected officials, including the key auditor, district attorney, and the sheriff. So, a little reminder of our elected Multnomah County's mission, vision, and values are really the guiding principles that inform the decisions county leadership, departments, and offices make to foster a thriving community and workforce. We really hope that these principles will also inform your work on the CBAC. And we see that the community involvement at large, especially Seabacks, are particularly in service to the county's mission, vision, and values.

So, we'll be giving a link to this in your packet, but wanted to just emphasize how important this is to the work you do and how important this is the work that you're doing to advance the vision and mission and values of the county. As you all know, county community budget advisory committees were established in 1986. This really is a commitment to invite community reflection on the budget process. Really adding that insight, expertise, and perspective on the needs or priorities. Really meaning an opportunity to inform the community about the county budget, including the commitments, resources, policies, and the relationship to community members it serves. This is really about deepening the public's understanding of county departments and the relationship between those departments and the people and communities they serve and the needs of the individuals who access services and also the committee is really to provide feedback to departments regarding those fiscal goals and priorities. These are the 11 CBACs that we have as you all know. One for the nonD department and one that we call the central CBAC which includes a chair from each department. CBAC members are expected to participate in meetings and in the budget process to share your perspective and your input on program offers and policy level budget decisions.

Together, you will write a written report of that feedback to the department leadership, elected officials, the chair, and the public during the public hearing process in accordance with the calendar. It is our hope that you will share what you learned back to the community and also that you will adhere to rules and responsibilities associated with government service, which is really the emphasis of the presentations that you all will hear today. We also want to clarify that SEACKS don't replace the county fiscal staff. You're not going to be expected to drill down line by line of your department budget or to crunch numbers. What CBACs do is provide that feedback, and perspective that is so invaluable and critical to the overall process.

The CBACs do not replace the county elected officials who ultimately make that final budget decision, but what you do do is represent an important part of the larger budget process. And as the chair mentioned, OCI, our office is committed to improving this process and the experience. We've been conducting

listening and learning sessions with CBACK participants and staff. We have been applying what we've heard and learned to make real changes in code and practice starting with improving communication but also compiling and sharing a repository of resources that you all will get to support your role.

We are looking to implement stipends, striving to make the CBAC process more compatible with the budget process, really maximizing the opportunity for the chair to receive and understand your feedback. So, embedded in that are feedback points throughout the process. After tonight, I'll ask you to just take a minute to give us feedback on how this onboarding session was. At the end of the year, we'll want your feedback on your experience, and we're hoping to be able to do more of that throughout the whole year with your department. If you have feedback or if something's not working for you, your coordinator, tell your support staff, or you can reach out to our office. Let us help improve whatever it is that's getting in the way of your participation. So, let's invite our first presenter for tonight.

Budget Process & Forecast

[Budget Process & Forecast Slides](#)

Budget Background

Christian Elkin: Welcome everyone. It is budget season, which is my favorite season of all the seasons. So, we're so grateful that you're all stepping up and willing to lean in with us on this budget process. It's really big, but I think it's and it's also incredibly important for you as valuable members of our community to lean in and help us see our way through a really complicated and important process. And so just very grateful. and with me tonight is Jeff Renfro, who's the county's economist.

I'm gonna start off and just talk about the budget process and a little bit about what we do here at the county and then we'll end with Jeff talking about the general fund forecast and the things that we're looking at as we think about how much money we have to spend in the upcoming years. And I just want to let everybody know that I use her pronouns. Amada, I'm assuming if people have comments in the text section that maybe someone will capture those and we can circle back to them or you can maybe raise your hand and ask me to explain something. Will that work? Sorry, we didn't work out the logistics, folks. Great. So, if we could go to the next slide, please.

What we're going to talk to y'all about tonight is we're going to talk about the budget process and just an overview of the highlevel milestones. We're going to talk about some budget facts and program offers so that as you all are doing the work, we're giving you tools to think about the work that you're doing. Then we'll talk a little bit about the general fund 5-year forecast and then we'll open it up for questions and then provide you with some resources. Amada, we'll send this as a PDF that you can send along to the entire group after this presentation. So if we can go to the next slide, please. So why is Budgeting hard? It takes a lot of resources. It takes a lot of time. First and foremost, we should let you in on the secret.

It's required by Oregon budget law. So, we're going to follow the law here in Multnomah County like we've been doing since our inception. But more importantly, and I think the chair talked about this a little bit, is that the county's budget is what I would consider probably one of the most important policy documents that the county produces every year. There's that old saying, you put your money into things that you value. And so where we are allocating or thinking about spending resources really signals to the community what the trade-offs are and what our priorities are going forward. And there's always a

scarcity of resources. Thinking about what those trade-offs are and where those investments go I think is really important. And we need to be able to demonstrate to the community how we're spending those resources.

The budget and the budget documents are those ways to demonstrate that commitment. It also, will tell us about things that maybe we didn't know as a community, things that are mandated or things that are kind of core or maybe something that we're partnering the state has asked us to take on or it'll tell us who's investing in the county. So, we get tax resources, but we also have really strong partnerships with the state government and with the city of Portland and Metro. And so, you can find that type of information in the budget document to really find out what those partnerships look like and where those investments are being made. So, if we can go to the next slide, I want to talk a little bit about our annual budget process. We don't have dates here yet.

On Tuesday, we're doing a big budget kickoff with the general fund forecast with the board. So, we're a little ahead here tonight, but we're going to give you general concepts of when these big milestones are being met. So, from November to February, we really call the preparation stage of the budget. And that's doing a lot of the scenes figuring out what our cost drivers are and what those estimates are. We're prepping the budget system and loading it with a lot of data related to especially personnel costs and salaries and TE, which are full-time equivalents, which essentially is a position at the county that's running the programs

Budget Process

We're doing the general fund forecast to see how much money we have to spend. And then we're working really hand in hand with the county departments to hand off the budget process to them so that they can do the good work of being the experts in their field and telling us what they need in order to achieve the outcomes that they need to deliver to the community. So, a lot of that work is happening November through February. Oftentimes during this time as well, those department leaders are meeting with the county chair to get feedback, to get direction, to really understand policy implications. And we're often at times working across departments because we don't work in silos here at the county. So oftentimes if a proposal is being brought forward by one department, there can be other impacts to the other departments. So we want to make sure that we understand those as we're going forward.

The departments submit and this is a lot of the work that's happening in November through February. You all are also working alongside the departments, right? You're meeting with them on a regular cadence. You're understanding the core work that they do, the strategies, what they're trying to achieve. So you're getting that education alongside of them so that when it's time to submit the budget or make some of those really tough decisions about where to invest resources, you've had this opportunity to really spend a lot of time with the department experts to understand why certain decisions are being made the way that they're being made.

These are due in midFebruary because we have to put a deadline on it or else we would just keep going forever. We like to say it's a Valentine's gift to the budget office. We ask the departments to submit their balanced budgets if we're in a resource reduction environment and to also submit requests for new funding or one-time only funding. and so they're submitting those to the budget office. One thing I want to say about that submittal phase is the department's best thinking to provide the chair with the options for making the budget decisions. so I guess what I'm trying to say here is these are not the final decisions.

These are road maps and plans of how the departments feel like they can best achieve their outcomes with the funding available. But the final decision has been made at that point and it is not a balanced budget because we still have to look across all the departments to make those first set of decisions from midFebruary to the end of April, the county chair is then spending a lot of time with the departments, with leadership, with experts really trying to understand how to make those tradeoffs countywide and where we can invest and where we need to maybe invest more to achieve something that maybe we see some disparities or we have an emerging trend to really address those things.

The work that you all are doing alongside the departments is really critical for the chair to have your kind of feedback and information in that mid beginning of March period because that's going to be another piece of information for her to use. So I want to highlight the critical nature of that timing and it's tight. It always feels really tight but it's also incredibly valuable. So if she has that feedback from your teams in that beginning of March period, that's really something that she can use as a piece of information along with, public engagement, talking to our nonprofits, talking to our other government partners to really get that fuller picture of how this budget will impact the community.

At the end of April, the chair proposes her budget and releases it to the public by Oregon budget law. It has to be a balanced budget. So unfortunately, we are not the federal government. We cannot run deficits. So all of our things that we want to spend money on, we have to actually have the revenue or the resources available to spend. and so that's a really important component of what the chair has to do when she s Releasing a balanced budget also puts it out into the community so that the board can begin public deliberation of those trade-offs and those budget decisions. Until we have a balanced budget that's available to the community, the board can't have public discussions, nor can they have behind closed doors discussions either.

So, it's a really critical moment in the budget process so that we can engage in that dialogue. The board then what we call in Oregon budget law approves the budget about 2 weeks after the chair releases the budget. That approval is not the final stage of the budget process. And I really want to stress this. That is a chance for the commissioners to review the decisions that the chairs made and really start to formulate what their views are on the budget and where maybe they're aligned or they're not aligned and we might need to make further adjustments.

So between the approved and the adopted are these chances for the board to hear from the departments from the CBACKS you all get to come and present to the board which is a really exciting time and then also have those community budget work sessions so that they can hear from the community. Then they're going to wrap that all up and adopt the budget by June 30th. We usually try to do it mid June just in case there's any waiting till June 30th. it could be really challenging for us, So, we want to make sure that we're giving ourselves a little bit of runway on the back end in case there's maybe some thorny issues that we need to work out. during the COVID hit a couple months before we were slated to adopt the budget and we really had to stretch that process out to make sure that we were doing as much as we could prior to budget adoption to address the pandemic.

t I know it's a lot of information and so I want to be really respectful that we're throwing a lot at you tonight, and make sure that you all have a chance to answer any questions.

Amara Pérez: Great idea. Thank you. No questions yet.

Christian Elkin: I'm sure. And if you have them later, please send them to Amada or I can come visit your CBAC. I love being invited to CBAC. Hint hint. So if you wanted to invite us to come and chat with you further, we would love to be a guest of yours. So if we can go to the next slide.

Ben Brady: I've been in CBACs before and where in this process is where we present and our reports are due?

Christian Elkin: So I think there's two places in the process where that is and I apologize for not highlighting them more clearly on this diagram. That's really great feedback, Ben. The first is kind of that beginning of March phase after the departments have submitted kind of their final decision- making about resources. Then also you all have an opportunity to provide your report as well and that will say things like we like this or we want more of this or we think the trade-off maybe needs to be these two things instead of what the department has proposed or even just sometimes I see in the back letters where they're really talking about what the priorities and the outcomes they're trying to achieve with maybe not necessarily commenting on the resource allocation, but we would really like you to focus on this area because we think it's really important. So that's happening in March and that will help inform the chair's decisions. And then we also ask you all after the chair's budget has been released and then let you know which things have aligned with your feedback. We give you that kind of second opportunity to come and talk to the board when the departments are doing their presentations.

So that would be mid May to mid June is when those will get scheduled where you're doing that more formal presentation to the county board and then they can ask you questions about why did your committee make this recommendation what information were you looking at and what maybe community lens are you bringing to that so that they can have a better understanding as well. All right, I hope that answered your question, Ben. Maybe give me just a little thumbs up if I was on the mark there. All right, everyone. We'll go to the next slide.

Revenue

This is a really simplistic understanding, but I think it's really important to really emphasize that we have to balance the budget at Multnomah County, which means if we have more revenue in the first little graphic there, then we can add expenses, right? We can add programs, we can expand programs. Sometimes we can put money in, savings accounts or buy down debt that will free up opportunities in the future. However, when we're in a resource constrained environment or we have less revenue and our expenses are growing at a faster pace than our revenues are growing, you're going to hear a story from our economist here in a moment. Then that's when we have to make reductions to programs and administration and support in order to balance that budget. So I just wanted to give you a nice visual. We would like to be on the right hand side of that visual but oftentimes we have what we call a structural deficit where it's impossible for our primary revenues to grow faster than our expenses do. So, if we can go to the next slide, I always say it's not a budget presentation unless I give you some numbers. So, here's kind of the adopted budget by the numbers. I'm not going to go through all of these. but I want to highlight a couple of things. I've been at the county for 23 years. I should do them the math on this. \$4 billion is a really big budget. That is a lot of zeros.

It has grown significantly in the last three years since we had our new voter initiatives which I'm going to show you in a minute. But those new voter initiatives account for almost a billion dollars of this 3-4 billion budget. So I want you to keep that in your brain as you're thinking about when you're talking to your

departments and those types of things. and then we've seen some pretty significant increases. Most of that has not been in our county general fund, which is our most flexible funding source. Most of that has been in these very dedicated voter initiatives that have parameters on how we spend the funding. And we can't just cross those funds from one fund to another because that would be I want to say voter fraud, but it's not voter fraud, but I think we wouldn't be allowed to do it.

The county attorneys would tell us that that is not an allowable use of those funds. So, when we're thinking about this \$4 billion budget, it does come in, fund silos that aren't as fungible as one would think that when we're facing a budget deficit that we could be able to just balance from one fund to another fund. It also supports almost 6,000 full-time equivalents or FTE, which are all the people that are doing all of the work out in the community to deliver the services. If we can go to the next slide, please. So, those voter initiatives, I just want to highlight them really quickly. I am sure most of you are pretty familiar with these.

We have the library capital bond voter initiative which we started with about I want to say 500 million that was passed by the voters. Really what we're doing is we're going out and we're building new libraries and we were refurbishing our libraries. So you'll see that fund decline over the five years of the program because as we build a building, we're spending the money and so that is expected to be spent over the five years. the Metro Supportive Housing Services funds. These are to help our unhoused neighbors get off of having to live on the streets and in those conditions and to really get them into stable housing. that is a great question.

I'm not going to get into preschool for all tonight because we wouldn't be able to finish this conversation, but they are a fairly quick ramp up of adding more slots every year and we're starting to see that really grow exponentially. The supportive housing services funding and then the preschool for all funding are funding that you're going to see year after year because it's funding an ongoing suite of services. If we can go to the next slide, please. the budget, where are you all going to find information? I always like to say I try to hide everything in plain sight and related to the county budget.

So on multco.us/budget are all of the documents that we created in the county budget office are all public-facing documents. We put it out there. You don't have to get behind a firewall. You don't have to ask a county employee to send you something. It is all right there. We hope it's organized in a way that makes sense for people to access it. But you're going to find budgets here. You're going to find our forecasts. You're going to find calendars. And most recently, because we're trying to catch up with technology, you're going to find a lot of interactive Tableau dashboards that hopefully make it easier for you to have some bite-sized access to a \$4 billion budget. We've heard from the CBACs that they are really using these dashboards, and it is incredibly exciting.

Christian Elkin: So, maybe after this budget process, we'll come back and chat with y'all about what tools were really useful and which ones you would like us to see, maybe build out a little bit more to make your really important job a little bit easier in the future. So, next slide, please. again, we also trying to put a lot of context around the numbers as you're seeing them. So, we'll take the county's press releases, put them alongside the budget documents so that maybe you can get a little bit more of a summary to whatever decisions were being made or road map or that kind of information. So, you'll see a little bit of us trying to really not just release spreadsheets into the wild that don't have any context. If we can go to the next slide, please.

Again, this is just another look at when you open our budget web page, what you'll find is all of the budget documents by the stage of the budget. and I really want to emphasize that the adopted budget at the end of the process is the place you want to go. That's where the final decisions are made. but you'll also find department presentations on our website going years back. You'll find our program offers, which we'll talk about in a moment. Budget notes, which are really the board identifying big policy issues that they potentially want to address during the year, and then any presentations related to those or information that was released. We have a budget monitoring dashboard right now to tell you how we're doing in our spending as we move through the fiscal year. And then we have our adopted budget dashboards as well to really just make that a more interactive opportunity for y'all. Next slide, please.

Program offers

So, I keep saying this: You're like, what is she talking about? The program offer is just a nice kind of neat little package for us to combine descriptions of services, budgets, and then a metric or an outcome of how we're measuring the success of that program or how many people were serving or what is a good way to decide how to evaluate the program. In other budgets, the city of Portland now uses program offers as well. Sometimes in other budgets, you'll maybe see this at more of a less granular level. So, you'll see it as maybe a division budget. But it really is the same thing.

We just call it a program offer where we're taking narrative numbers and outcomes and putting them in one kind of package of services and saying if you're interested in this service, this is what it does. This is how we measure success and this is how much it's going to cost and this is the different funding that's available to fund this program. and I'm going to show you a program offer in a minute. these metrics get used all of the time especially by the board as they're evaluating and making decisions about what to invest in. I can tell you we're really looking to maybe uplevel these metrics at more of a division because we have over 500 program offers.

So sometimes it's really hard to tie the flow-through narrative from what the department or the division is trying to achieve all the way down to the granular level of the program. And so we're trying this year to really think about how to provide intermediary or intermediate outcome level information. So then you can then hang those program offers on that data and it might be more easily understood by both our leaders and the community of what we're trying to achieve. We can go to the next slide please. Thank you Jeff.

I'm going to show you a program offer in a minute, but I think it's really important, and you'll hear from Terin and Joy about the equity lens that we ask departments to use when we're writing these program offers. But I think some things that you all can keep in mind as the departments are giving you these program offers as the way to represent their services. Some things that you all can think about to ask or as you're reading the program offer is do you understand what it does, and who it's serving. I think that's really the point of the program.

And so giving departments kind of that clear feedback on, I think I have a good idea about what this program is doing, but I need some more tangible examples or some clarity around who it's serving. Is it geographic based? Is it countywide? Are we focusing on serving and ensuring that we're reducing disparities? What are the things that we're really focusing on in this program? I think finding out how it fits into the department's strategies and what they're trying to achieve both short-term and long-term and then the countywide strategies and how the department fits into those countywide strategies are really important questions. Asking those experts what does success look like?

How we know that we've achieved something by making this investment. Have there been major changes to the program? Have you changed who you're serving? Have you had to make reductions because maybe you lost grant funding? How does that impact the outcomes? And then lastly, how it's funded, I think, is really important to understand who's primarily driving and describing what those services look like. Sometimes we get grants and they're very prescriptive about how we're supposed to do the work. Sometimes we'll get money from the state and it's maybe passed through from the federal government for Medicaid. That has rules around how that funding can and cannot be applied.

So understanding funding will also help you understand why the services are potentially being delivered in a certain way. Sorry, I am talking a lot and I apologize. I'm throwing a lot out at you. We can go to the next slide and I'm going to show you. You can see any of these online. They're really accessible, but I wanted you to just have some familiarity with what the program offers looks like when I say words, outcomes, and numbers. So, what we ask is we try to make sure that you understand which department is submitting the program, what type of program it is, and we can talk more about this in the future. Is there a program contact there if you want to ask questions about the program? And what stage of the budget process is it in?

So, this is an adopted program offered from fiscal year 2025. We asked the departments to write kind of an executive summary or what I would call the elevator speech. If I had to get in the elevator and say, "What does the budget office do?" These are my two or three sentences about what's most important about the work that I do. We ask for a more in-depth program description. I really like the way that county human services does. They list a program goal and then they list the activities that they're trying to achieve to reach that goal or that they're undertaking to reach that goal. Then you see the box down below is the performance measures. We ask that they report out for three fiscal years of performance measures so that you can see trends and understand if we're overachieving where adjustments might be made. They also have the opportunity to describe those metrics and why they're important.

And then when you flip over the program offer on the back side is what you're seeing on the right hand side of the screen is the numbers. So we have both what did you budget in fiscal year 2024 and then what are you budgeting for in fiscal year 2025 to continue to do this program. We have an explanation of revenues. So that's telling you who's paying for the program, where the funding is coming from. And then we also have a significant changes box that really says, "Are you doing something different? Please let us know what that thing is." And this is when you all are meeting with the departments, they're going to really be referencing these program offers. So I wanted you to have just a little early look at them so that it doesn't feel so foreign as they're using the county nomenclature around the budget process. We can go to the next slide, please. I am done talking. That is so exciting for Jeff Renfro, our county economist, is here and he is going to talk to you a little bit about the county general fund and the forecast and why that's an important piece of information that really helps inform the budget process as we're going through it.

County General Fund

Jeff Renfro: Christian said, I'm Jeff Renfro. He/him pronouns. I work for Christian in the budget office. and let me say I can't see you all when I'm in presentation mode. So if someone has a question, just come off mute and interrupt me so I know to stop. So the first thing I'll say as we're getting started is that there's a lot of really complicated information here. I'm just kind of skimming over the top of it. So if you're curious to go deeper into this on Tuesday morning, we're going to do a full presentation to the board. if you can't

catch us Tuesday morning, it'll be on the county's YouTube page. So you can go back and watch the fuller presentation if you want to know more about anything I've talked about here.

First off, why does the county hire an economist? Why do I work in the county? so similar to why do we budget? The first part of the answer is that it's required by law. We have to produce a five-year forecast and produce it for the public so that people understand the circumstances under which we're making these decisions. but at a deeper level, I think that context for decision-making is really important. So, we use the forecast to identify community needs. We describe the environment that we're making these decisions under. And then it helps us tell the story of what the county is doing, why it's doing it, and then really kind of sets up the constraints under which our board is making those tough decisions. So, I'm going to go over a few of the most important concepts in the forecast to really understand the county's financial context.

So, first off, the reason we focus on the general fund is that's where our discretionary resources are. So, that's the pot of money that the board can use for whatever programming they see. As Christian referenced earlier, we've got a lot of dedicated funds and different departments and there's not always a lot of flexibility associated with that. So the general fund is really where the county can set whatever priorities it wants and then it can be more reactive to what's going on in the community. So when we're thinking about general fund resources, property tax makes up about two-thirds of those discretionary resources. So it's by far our most important revenue source. And Christian reference what we call our structural deficit and the property tax system is really the source of that.

Budget Forecast

So, I could truly talk about our complicated Oregon property tax system for an hour, but instead I'll say, what this graph is illustrating is kind of the root of our problem. So, the purple line on top is of all properties in Multnomah County. Real market value you should think about as something close to what you could sell the property for on that turquoise line in the middle, that's our assessed value is what the tax rate actually gets applied to. So that's what's actually driving our property tax collections. And as you'll see that real market value is kind of going up and down, but mostly going up pretty significantly over the period of time we're looking at.

Whereas assessed value based on restrictions in the Oregon Constitution typically only grows at between three to maybe four and a half percent if we're really lucky every year. So that's a real constraint on our most important revenue source. And what this means is that under normal circumstances, we would expect our costs to grow faster than our revenues, which is what we describe as our structural deficit. move on, but I'll say that the property tax stuff right now there's some really interesting stuff going on and on Tuesday we're going to spend a ton of time on this. We have some cool visuals. so there's a lot of interesting stuff here that I'm just going to kind of gloss over unless you all have questions about it. Our second biggest revenue source in the general fund at about 25% is our business income tax.

And business income the best way to think about it is a tax on the profits of companies that do business in Multnomah County. So the payments are really highly concentrated on a relatively small number of businesses. So in a typical year we have about 45,000 businesses that file business income tax returns. Out of that about 300 of them account for 60% of the revenue that we collect. And in a typical year, about 10 of them account for between 15 and 20%. So most of the revenue from this comes from really large companies that are operating nationally or internationally. And when they calculate their profits, there's a mechanism for calculating how much of that is associated with Multnomah County, and then they pay us

tax associated with that. This tax is really volatile. So that means when there's an economic downturn, we expect to lose a lot of revenue here. But then when times are good and the economy is expanding, this can also grow really quickly. So it's a little bit difficult to manage and it concerns me all the time. It truly keeps me up at night sometimes. but it's an important revenue source for On the expense side, by far the most significant driver of our expense growth is personnel costs. So I usually say that the simplest model of how to think about the county's finances is that we collect property taxes and then we use that money to pay people to do the county's work. Right?

So when we're thinking about our expenses, the rate at which our personnel costs are growing is a primary indicator of the county's financial health. So for the next year, we expect our personnel costs to grow by 5.72%. During this period of really high inflation that we're just now coming out of, our personnel costs were growing significantly higher than this. But in the preandemic world, 5.72 is still pretty high for us.

That's higher than what we need to be on a more sustainable excuse me financial path when we disaggregate what makes up our personnel costs the thing that really drives it is our cost of living adjustment so the conditions of the cola are tied to inflation but all of that is negotiated in our labor contracts other significant drivers of our medical dental rates and also PERS is another thing we could spend a ton of time talking about. but I'll just say that our PERS costs basically for every dollar that we pay an employee in wages, we're paying about 40 cents into the PERS system. So it's a really significant cost.

Depending on policy decisions at the state level or investment returns in the PERS portfolio that has an impact and causes our PERS rates to go up and down typically up. So that's also a significant driver of our personnel costs. Keep moving there. so this is a graph that shows all of our county departments and then it shows how they're funded. So, as we're looking at anything in that sort of darker blue that represents general fund funding, if you look across the departments, you'll see the district attorney, community justice, and the sheriff are all our majority general funded departments. So, we typically spend about half of our general fund resources on public safety. One of the reasons for that, as Christian sometimes says, no one wants to give us grants or special awards to do public safety. So, it's something that we're sort of forced to fund with our discretionary resources. the purple portion of these bars, those are preschools for all funds. That's mostly in the Department of County Human Services over on the right where preschool for all is run out of. There's a little bit in the Department of County Management where we do the administration of the tax. That orange section is metro supportive housing services funds. So the biggest chunk of that is in the joint office, but then there's a little bit of that funding that's sprinkled around to the other departments to run programs that are related to housing and homelessness. And then that turquoise color is all other funds. So in the case of the library it has an independent taxing district.

So you pay property tax that goes straight to library services and other cases like in the health department or the department of county human services. That is a lot of funding from the state or the federal government that's going to support some of the social safety networks that we do. So when you're thinking about some of the decision-making of the specific department that you're working for, a lot of the time thinking about how they're funded is going to tell you about the constraints they have on what they can or cannot do, what they even have discretion over doing or not doing. so then to get to the big picture when we put all this information together, this is the five-year forecast.

Because we're not releasing the new forecast until Tuesday. What I'm showing you here is where we left the board in May during our last forecast presentation. So, if you look at that fiscal year 2025 column, the May 2024 forecast line down there at the end, it's a zero. As Christian said, when the chair releases her

proposed budget, it has to be balanced by law. so last year our starting point was an expected deficit of \$4.1 million. We went through that long budget process that Christian already described to make priorities and make decisions. We got ourselves to a balanced budget. For fiscal year 2026, in the spring we expected a starting point of a deficit of \$15.7 million.

I can tell you without getting into the specifics that our financial position has not improved enough to significantly change that. So, that's kind of still the neighborhood of where we're going to start our 2026 process. We're thinking about why the deficit grew so much between 25 and 26. We have to go back to property taxes. So, when we think about continuing to provide the same level of ongoing services, what we call our current service level, just to continue to provide the same level of pro programming in the general fund, we need additional revenue of about \$30.4 million just to kind of stay steady. As I said, property taxes are 2/3 of our discretionary general fund revenue.

For 2026, we expect to only get \$8 million of additional property taxes. That has a lot to do with what's going on with property values in downtown, which we'll really go into detail on Tuesday, but just fundamentally, if we need 30.4 to just stay steady and we're only getting eight from our biggest revenue source, the math just doesn't work, so that's why fiscal year 2026, I think, is going to be a really tough year and we're going to have to make some really, really difficult choices. I think this is our last slide. This is a link to places to find resources and all the information that Christian suggested. So, with that, I'll stop and I think we'd be happy to answer questions if we still have time left.

Questions on Budget

Denell Broncho: Hi there. I'm the deputy director and CBAT coordinator for the Department of Community Services. And my question for either Jeff or Christian is next week when the budget is kicked off, if you will, or early release, I'm not sure the terminology. are the CBACK members invited to that?

Christian Elkin: Absolutely. We just sent out an invitation to all the department leaders and to Amada and to so it is a board briefing. so it will be both available in public or online on our YouTube channel if people want to watch it. it's not a vote. It's just an interactive discussion so I think it's really important for if people want to see that and then we put it up on our website Dell so that people can watch it and have easy access. You don't have to go combing through all the board documents to find it. So as soon as that video is available we'll put it up on our website.

Hi Bill, I saw your question. we're anticipating Metro does the forecast for the supportive housing services measure and so they have their own economist as well. that should be sometime in November but it might be closer to December as you know there's a lot of conversations about any changes that might be happening to the supportive housing measure. So I'm guessing bit why there's a little bit of delay because of the other conversations that are going on. But as soon as we have access to that too, I know that the joint office will be releasing that so that people have access to it.

Amara Pérez: Any other questions? thank you both so much.

Jeff Renfro: Yeah, thank you for having us. As Christian said, please invite us to anything.

Budget Equity

[Slides on Budget Equity](#)

Equity Overview

Joy Fowler: I am actually very happy that Christian and Jeff went before us because it really was a nice setup to kind of lead you through the rest of the process that supports everything that they are talking about. So before I move forward, my name is Joy Fowler. I use she/her pronouns and I am Multnomah County's chief diversity and equity officer and I have been in the role, it'll be three years in March and so it is really our pleasure. I think I've come every year since I've been here. and this year we're putting a little twist on it which I'm really very excited about because we really want you to have information that is useful for you to use right now. and I think that you will find that incredibly helpful.

I don't know how many have been on before, but I think when you see what we're presenting today, you'll find it's much more useful than what we have done in the past. And I'm really excited to have my partner, Terralyn here today. We've done this budget equity presentation probably for the last two years. And so I just wanted to welcome you all and thank you all for giving your time. It's about 7:03 and we'll just dive right in. As we come to you today, we want to make sure that we're just sharing a little bit of the road map around what will happen for you. I'm sorry, Teran, I think you're already on the next slide. but we wanted to just let you know we're going to talk a little bit about the county's equity commitments. Terolyn will go over the equity and empowerment lens and the five Ps. Then there'll be some open discussion so that you can ask any questions that you would before I turn it over to Terin, there are a couple things that I want to go over with you. So, if we can go to the next slide. It really is important for us to acknowledge the root cause of racial disparities and honestly the role that the government has played in the intentional design. When we think about racial disparities they range from a whole host of things. everything. If you want to think of redlining and the restrictive covenants along with neighborhood segregation to the war on drugs in comparison to mass incarceration. if you want to go back even further, you think about slavery compared to genocide and there's gentrification and displacement of individuals in their neighborhoods. And then even more recently when you think about the impacts of COVID and the culturally specific strategies to reverse inequity. So those are just a few things that I wanted to give you in terms of what we think about. And it's equally as important for us to really embrace how undoing systems and structures that were designed to create disparities really is part of the county's responsibility. the county developed our own equity and empowerment lens, like I said, you'll hear Terrell Lynn go over that a little bit later, which really serves as a guide for users to ask key questions in five key areas, also known as the five Ps.

And then when we're applying the lens to our social services, ideally they should yield them the results that you see on your slide. Whether it's fair and just distribution of resources, systems that are sustainable and sustain all people, whether it's around meaningful engagement of communities of color, authentically embodying racial equity and empowerment principles. And last but definitely not least, bold and courageous commitment to addressing root causes and the barriers. So in addition to that, before I turn it over to Terara Lynn, I just want to walk you a little bit through equitable budgeting and what that means here at the county and some key focus areas.

Budget Equity

So this information comes directly from our budget equity tool that we provide to our employees. So let me back up a little bit. Every year right around this time, Terolyn and I start to gear up for delivering budget equity, and empowerment lens trainings as many employees that will attend so that they can understand when they are creating the program offers that Christian and Jeff spoke of that they're not building equity in at the end of the process, but building it at the beginning. So our training serves to help them along in

that journey. And so there are just a few things that I want to share. And the essential areas that program offers really are often the only information that you as community members, elected and elected officials have regarding a particular program or a line of business. So it really is important that we help our employees understand that they have to be mindful of that and really provide robust information at the program level to really inform the decision makers and make sure that the program objectives and service delivery models are making sure that they're essential to the program offer.

Joy Fowler: When we think about data and outcome measures, we always want our employees to kind of ask themselves, what data are they collecting on demographic data regarding whom we're serving? Are there ways to determine who is the most in need? How are we conducting our outreach? All of those questions are designed to help us uncover and address racial and other disparities. And then really last but definitely not least, making sure that we are aligning our program offers outcomes to not only department but also county level commitments to advancing equity and asking ourselves questions like what is the purpose of the program or the mission of the work unit and can it be aligned with the department goals? Can it be aligned with county level equity goals and how would we quantify those? So you'll find that during this process we really ask our employees to consider a lot of questions as we're working through this. And so I wanted to share that before I turned it over to Terara Lynn just so you have an idea of both the vision for equitable county services and the focus areas that we ask our employees to look at around equitable budgeting. So are there any questions before I turn it over to Terralyn? We're also checking the chat. So, something may not come up for right now, but as we're moving through things, you might find that a question does arise. So, while Terralyn is presenting, I will check the chat and I'm happy to either answer questions in the chat or direct them to Terin so that you can hear both of our responses. And we'll just do that. And without further ado, I am super excited for you all to hear from an employee within the Office of Diversity and Equity who does this work better than anybody that I've ever known. So, here you go.

Terralyn Wiley: Thank you, Joy. And yeah, thanks for setting the bar so high. So, hopefully y'all aren't disappointed. but I'm Terralyn Esamia. Wiley is my I guess maiden name so hopefully it'll change one day, but Wiley or Esamia, if you see it anywhere, there's not a lot of Terralyns at the county. I don't think there is anyone other than me, but it's me. Thank you again, Joy. And I'm just going to start obviously by introducing myself. Terralyn Esamia or Wiley and my pronouns are she, her, and I work in the office of diversity as the senior equity and inclusion policy analyst. So, I'm super excited to be here and to meet y'all today.

Before I jump into the meat of what I'm going to give you around the equity and empowerment lens fivepiece framework, I did want to share a little bit about, the practice of sharing at Multnomah County, we are committed to creating and sustaining an environment where everyone can show up as their full selves and thrive. And so, normalizing the sharing of pronouns is one way to support those efforts. Sharing pronouns are important for creating inclusive environments as we honor everyone's right to be referred to in a manner that acknowledges and affirms each person. So although we're striving to normalize this practice, it is absolutely optional. And so typically whenever I'm facilitating a workshop or a meeting, we would start with an introduction. So I'm like, okay, I share this bit about pronouns, but I wanted to share it with you all as well. And so, usually we ask folks to share their pronouns and any other identities that they would like others to be aware of. And so for many folks this can include race and ethnicity, and maybe even some element of their lived experience, whether current or past. it really depends on what kind of meeting it is, what's the intended objective of the meeting, who's there. So for example, sometimes folks will share I'm Terralyn. My pronouns are she/her, I'm a pet owner, and if you see me looking away while

we're in this meeting, it's because I'm looking at my cat or something like that. So folks just, sometimes want to share extra to let folks know the perspectives that they're bringing to the table. And so we love that and we honor it. And so I share this with the intention of supporting your intentional community building process as you all begin or some of you continue to support the work of the county as a member of a CBAC. So if you're curious at all and want to know more information about the practice of sharing pronouns, there is a link provided in this slide which you will all have access to I guess after this onboarding. So that's my pronoun spiel and I'll move on. Let's see. There we go.

Leading with Race

So at Multnomah County, we lead with race because across all measures of health and social mobility, race continues to be the leading indicator for inequalities and disparities. And so as you can see illustrated in the slide within the different institutions and within different demographic categories we continue to find that race is a leading indicator for disparities and we inclusively lead with race which you may have seen in an earlier slide I think it was shared by Amada that us inclusively leading with race is one of our values but that's what we do essentially to fulfill our promise to address racism within our workforce and in our community. And the word inclusively ensures that communities with overlapping identities and people for whom those identities compound disparities are not overlooked. And so when I'm talking about these identities with compounding disparities, that's what we refer to as intersectionality. and we must center the experiences of people of color within other marginalized identities because of their compounding disparities. And so I like to show this video that I feel like really kind of sums up what intersectionality is.

Intersectionality is a way of understanding social relations by examining intersecting forms of discrimination. This means acknowledging that social systems are complicated and that many forms of oppression like racism, sexism, and ageism might be present and active at the same time in a person's life. Everyday approaches to building equality tend to focus on one type of discrimination, for instance, sexism, and then work to address only that specific concern. But while the career of a young white and able-bodied woman might improve with gender equality protections, an older black disabled lesbian may continue to be hampered by racism, ageism, ableism, and homophobia in the workplace. Intersectionality is about understanding and addressing all potential roadblocks to an individual or group's well-being. But it's not as simple as just adding up oppressions and addressing each one individually. Racism, sexism, and ableism exist on their own, but when combined, they compound and transform the experience of oppression. Intersectionality acknowledges that unique oppressions exist, but is also dedicated to understanding how they change in combination.

The roots of intersectionality lie within the black feminist movement with legal scholar Kimberly Crenshaw originating the term. Crenshaw felt that anti-racist and feminist movements were both overlooking the unique challenges faced by black women. She stated that legislation about race is framed to protect black men and legislation about sexism is understood to protect white women. So simply combining racism and sexism together does not therefore protect black women. Intersectional theory is now applied across a range of social divisions and also to understandings of domination such as those associated with whiteness, masculinity, and heterosexuality. Intersectionality is not only about multiple identities. And it's not a simple answer to solving problems around equality and diversity. It is however an essential framework as we truly engage with issues around privilege and power and work to bring them into the open.

Intersectionality means listening to others, examining our own privileges, and asking questions about who may be excluded or adversely affected by our work. As importantly, it means taking measurable action to include, and center the voices and work of marginalized individuals.

All right. So, I like to show that video because again I feel like it's a really good way of explaining intersectionality. And I want to share this with you all because this is what we share with all of our Mult County staff who take our budget equity workshops to better inform their work and how they are in their process of program development. And so, understanding intersectionality, especially when we're assessing the communities impacted by our programs, is so important. and assessing those impacts, we must be aware of the compounding barriers for the various identities, communities that folks belong to. And so, acknowledging and understanding these barriers can help us be more intentional in our decisions.

So the visual shows us like the compounding barriers trans people of color face when accessing behavioral health services. And so as you can see, it's like, if someone who is black, indigenous, or a person of color may be met with language access, mental health stigma, costs, or even immigration status as potential barriers when trying to access behavioral self health services. Somebody from the LGBT community may be met with homophobia, transphobia, documentation, or cost as potential barriers. And someone who holds both of those identities, again, those barriers are compounded. So they could be met with all of those things, racism, transphobia, homophobia, documentation, immigration status, cost, language access, and mental health stigma as potential barriers.

And again, understanding this is so important because when we are, looking at the communities that we're serving with our services. Understanding these intersections will help us make more intentional decisions about how we provide those services, who we work with to get one example that I like to share is from the Multnomah County Health Department has a lot of different services. and many that are culturally specific to various communities. And during the height of the pandemic, I had the privilege of working with a small group of people to put together a program to provide resources to community members impacted by COVID. And one of the communities that we were providing resources to were the black community. And so in order to reach the black community, we worked directly with local black churches to provide those resources.

But having an understanding or I should say and having an understanding around the intersectionality of being black and queer, we knew that somebody who is black and queer may not feel comfortable going into a church or even feel welcome to receive those resources. So in addition to working with churches, we also worked with organizations that we knew also centered supporting black queer communities. So, Black and Beyond the Binary was one organization that we worked with, to ensure that these resources are getting out to the people who they were intended for. And so, that's just an example of intersectionality. And again, providing that example to our county employees as they're building programs just gives them a little bit more to think about as they're, being intentional in thinking about, okay, this is the program, this is the service this community needs, this is how I'm going to approach getting that service out. And before I move on, are there any questions about intersectionality? All right.

Equity & Empowerment 5 Ps Framework

Terralyn Wiley:All I'm going to move on to what we all came for, which is the equity and empowerment lens fivepiece framework. So, the equity and empowerment lens was developed by county staff in 2012. sorry. Okay, that was just Joy saying feel free to place your questions in the chat. Okay, got it. I'm going.

Initially, these served as a suite of academic frameworks to support our decision-making processes in a way that advances equity for the folks most impacted by those decisions. And again, it was 2012, more than 10 years ago. So while there have been changes in the environment compelling updates to the lens, in its current state, it is still a very helpful tool to start with.

Terralyn Wiley: you will all have access to the equity and empowerment lens frameworks. I think I don't know if you've already been given access but for sure after this onboarding I'll make sure to send things to Amada. but what I'm going to focus on is the hallmark of the lens which is the five Ps framework. And so this is what we provide to county staff to help folks be again more intentional in their decision-making. So the five Ps are purpose, place, process, and power. And this is what we want folks to consider when we're working through issues or making decisions and when we're building programs. And so, what I'm going to go over with you all is what I go over with, folks when we do our budget equity training and it's just the reflective questions that are specifically adapted to the context of building a program. And so, first I'll just give you kind of the rundown on the questions in a more broad term. So, when we're thinking about purpose, we always want to start here. In a purpose-driven system, all parties at all levels align around transformative values, relationships, and goals, moving towards racial equity, integrating an emphasis on doing less harm and supporting actions that heal and transform. So, the purpose is always where we want to start because it serves as our anchor. And then, once we've got that, solidified like is, this is the purpose, we want to reflect on people.

So, who is positively and negatively affected by this issue or how are people differently situated in terms of the barriers they experience? Are people traumatized or retraumatized by this issue or decision area? And you want to consider the contextual effects. And then when you think about a place, how are you or your decision accounting for people's emotional and physical safety and their need to be productive and feel valued? How are you considering environmental impacts as well as environmental justice? more in regards to how public resources and investments are distributed geographically. and then we want to think about the process.

So, how are we meaningfully excluding those who are affected, especially communities of color? What policies, processes, and social relationships contribute to the exclusion of these communities? and are there empowering processes at every human touch point? What processes are traumatizing and how do we improve them? And then lastly, power. So, what are the barriers to doing equity and racial justice work in regards to this decision area or program? What are the benefits and the burdens that communities experience with this issue? Who is accountable? What is your decision-making structure? How is the current issue, policy, or program shifting power dynamics to better integrate voices and priorities of communities of color? So, these are just more of the broader reflective questions.

And so what we provide to our staff who are putting together the programs are questions that are adapted to be more program specific which I will go over. So when we're thinking about purpose somebody who's building a program offer what is the mission of this work how does this program address racial disparities we see in data. So the same way that we provide them with these questions, these are questions that you all as reviewers can be looking for the answers to and as you review these program offers. Let's see people. So does the program offer outline or have you?

So, I know Christian showed what a program offer looked like and it is not a lot of space to put a lot of information, but these are some of the questions or answers that you can be looking for as you're reading the thing. So, who is most in need of this service? How does this program target resources to specific populations? Is this program accessible for all? And does the budget account for potential

accommodations? So we even provide our colleagues with suggestions around considering creating a budget line item for access and accommodations. The line item could include staff or applicants needing accommodations. It could include interpretation and transcription services for meetings or events.

It can include really anything that's accommodations or other access related needs for the people that we're serving. and we even encourage folks if you are contracting with someone to do this service, we encourage them to ask their contractor to put a line item in their budgets for accessibility. And let's see and then with place. So, how does this program or service remove geographic barriers to access? How are we trauma informed in selecting our physical environment? And then process. So, how is the community most impacted? How is the community engaged in program evaluation? And I know Christian had talked about the metrics and this is the issue. This is the service that we're going to do to solve it and this is what the numbers that we're going to serve or this is what success looks like. A really good question is how is the community that you're serving a part of developing what success looks like? And those are questions you all as evaluators can ask. and then power. So, how are we accountable to the community most impacted? What are the demographics of the staff providing the service or the program? Do they represent the community most in need of the program or service? These are also questions you all can be asking and kind of looking for as you're reading over a program and I think, sometimes folks are like, what does it look like to be accountable to a community that I'm serving? It looks like doing surveys and getting feedback.

Are there opportunities for your community that you're serving to provide feedback and if there have been, what has the feedback been? And have you let that inform any service changes or anything like that? I think that those are just things that you can be thinking about as you're reading a program and so this slide is really just all of those questions in one place for you all. So, the same things I just read, all the things. I won't read them again because they're right here. and you will all get them and I don't want to take any more time. but that's pretty much what we provide to all of our Mult County colleagues who are doing this really great work of putting together program offers. And so, I'm so glad that we can engage with you all to give you kind of, a tool of this is what we give to them. Feel free to be using the same thing as you're reviewing or evaluating what you're seeing.

Are there any questions? And again, you will all have access to this. I feel like I ran through it really quickly and I know So, I also am a processor, so this could just be a lot for a Thursday night. But, yeah.

Amara Pérez: Look at all that thank yous. All the love. Thank you. And our last presentation, Katherine. All right.

County Attorney: ethics and legal

[County Attorney Slides](#)

Overview

Katherine Thomas: Save the lawyer for last. I don't know. That's a rough way to end, but thanks all for sticking it out and appreciate your attention as we talk about a very important topic. Sometimes they put the juiciest stuff last, so you stay the whole time. Let's think about it! My name is Katherine Thomas. I'm an attorney in the county attorney's office. I advise our libraries, our elections division, office of

sustainability, and I also help with some of our general governance issues. And so, I'm going to go ahead and attempt to share my screen. Please bear with my not being techsavvy. Okay.

So I'm here to talk with you tonight about basically your roles and responsibilities associated with government service. So, now that you're members of the SEBAC, you have some new responsibilities. And any of you who already work in government or have volunteered with government before, hopefully this will just be a refresher for but these are things that come along with government service. And we'll be talking about government ethics, public records, public meetings, and then political activity by public officials.

And what you'll see as a theme throughout all this, we don't have a lot of time tonight.' to take 15 minutes. I'm going to do my best to stay within that time. These are topics that sometimes we'll give hourlong presentations on just one of these topics. So this is really just the ending point of your learning about these topics. I have resources linked at the end of the slide at the end of the presentation. And one of the resources you'll see is staff is a great resource for and really the goal tonight is for me to give you enough information so that when you need to get more information. I'm going to give you some things to be on the lookout for, sort of red flags for things where you need to get more information.

But as you think about these rules and responsibilities, hopefully a lot of them will be intuitive because what you'll see as the theme throughout this presentation is everything we're going to talk about tonight is really intended to ensure transparency and accountability which are two words that hopefully you associate with government and government service. And so that is really the goal and the theme behind these rules. And hopefully that as your sort of guiding principle will help you issue spots as you think about some of the issues we're going to talk about tonight. So we'll dive right in with government ethics. So the first thing to know is that for purposes of both Oregon's ethics law and the county code of ethics, you are now public officials. What that means is these ethics rules are attached to you while you're serving on the SEAB even when you're not at a SEABAC meeting.

Public official ethics

So you are wearing your public official hat for purposes of government ethics as long as you're serving on the seaback. And the main overarching rule behind government ethics is that you can't use your role as a public official to gain financial benefit or avoid financial harm. And this hopefully makes sense to you, right? We expect that government officials aren't in it to be able to secretly benefit themselves financially or avoid big debt, right? you're there to serve the public. And in order to make that rule effective and not allow for easy ways around it, the rule in many cases also applies to a benefit or avoidance of harm for your relatives, members of your household, so the people you live with or a business a relative member of your household is associated with.

Different rules apply to different sets of people, but again, just for purposes of tonight, what you should be on the lookout for is are you getting some kind of financial benefit or avoiding some kind of financial harm in association with the CBACK, or is someone in your orbit getting financial benefit or financial harm because of your role? So, because we don't have time to go into all the rules tonight, what I'm going to give you instead are some issues to be on the lookout for. If you answer yes to any of these questions, you might have an ethics issue that you need to look into more. And I want to emphasize these ethics responsibilities are personal to you. So, it's really important that you learn and are able to apply these rules because you're personally responsible for complying with them. That being said, you're not alone.

Again, remember, you've got staff, you've got the resources at the end. We're here to help you to make sure you can understand and apply these rules. So, let's just walk through these briefly.

So the first question is are your relatives, members of your household or an associated business being given something of value only because you were on the CBAC. So, for example, let's say you were all meeting in person at the Molt Noma building and one of the restaurants nearby found out and they said, "Hey, on meeting nights, 10% off for any CBAC member. You're being given something of value, a discount." And it's only because you're on the CBAC. It's not available to everybody. Or you're meeting in person and there's a stack of pads and pens and you think, "I've been needing something to make my grocery list. I'm going to grab a few extra and take those home." Those are only available to you because you're on the CBAC. And getting those is a financial benefit to you that's not available to other people. It's only available to you because you're on the seabag. So, if you find yourself in that situation, you need to stop before you take that thing of value and see if you might have an ethics issue.

So the next question to ask yourself is are you being given something of value by someone who has a unique economic interest in your decisions or in the county? So the question there and again just thinking about this from a practical perspective. Let's say someone is applying for a land use permit from the county. They've got a unique economic interest in the county and they say to the land use planner, "Hey, can I take you out for a nice dinner?" That wouldn't feel because it would feel like maybe they're trying to give something of value to get something in return. So, this is less likely to come up for you as a member of the Caback, but you just want to be on the lookout. Are you being given something of value by someone who has a unique economic interest in either your decisions at the CBAC or generally in the county? If so, you might have an ethics issue. And then the last one is, are you being asked to make a decision or recommendation on the CBAC that could financially benefit or financially harm you or the people or entities listed above? So again, usually we're really careful about not putting people on a seaback if, say, they have a relative that works in the department of the seaback that they're on. But for example, you were making a recommendation to increase the salaries in a certain department and your brother happened to work in that department, that would be a decision or recommendation of CBAC that could financially benefit your relative. And so you might have an ethics issue.

There's a lot of detail that we don't have time to go into tonight, but just kind of keep this as a list in the back of your mind to be thinking about when you need to go get more information from an ethics perspective. I also put at the bottom, do you have a monetary or investment interest in any matter before the SEAC? I put it at the bottom because it's not actually an ethics issue. This is something in our county code that is specific to the SEABACK. So, it's not a government ethics issue. It's not in state ethics law specifically. of course, it could be captured in some of the questions above, but I just wanted to emphasize that there's actually this additional obligation for you as members of the Cab. moving on to public records. the main things to know with public records law is first, what does the law require?

Public Records & Meetings

Katherine Thomas: It requires that the public have a right to inspect public records except any records that are exempt. And to facilitate that right, the county, including you all, have to retain public records in a retrievable manner for a certain period of time. So for you all to be able to comply with this, what you really need to understand is what is a public record? And I want you to think really broadly. It's any writing, but in any form, So, it's actually not just writing. It could be emails. It Could be the recording of this training. It can be calendar entries. Any type of record, could be a public record if it relates to the conduct

of the county's business and is used, or retained by a public body or people who work for that public body or volunteer for it. So, even if it's in your personal device or in your personal email.

So whether something is a public record is not about where it lives. It's about the content of the record. So with that, I've got two pieces of advice for you all. The first is to be mindful in your creation of public records. If you don't want your record to be subject to publication in the newspaper, for example, then maybe don't write it down. The second is that of those records that you create, my recommendation is that you turn those over to county staff when you're done with that way, the responsibility to retain the record transfers to the county staff, And there are serious penalties for knowingly destroying public records before they reach the end of their life. There's certain periods we have to retain them for.

So the easiest way to sort of transfer that is to make sure that the county staff have your records when you're done with them. So if you're taking notes right now, you're creating a public record. That's great. Use it as you need it. When you're done with it, turn it over to county staff. Similarly with emails, it's often easiest if you are just copying a staff member. if you happen to be texting about it, if the staff member's on the string, that way they've got a copy of it and you don't have to worry about additional retention requirements. We're I'm going to move on to public meetings. The basic rule here is that a quorum of the seaback cannot meet in private to decide on or deliberate toward a decision. Remember, we're talking about transparency and accountability.

The idea is that the public should be able to see your decision-making process as you make decisions. So, a quorum is usually 50% plus one. I'm not sure how many people are on your CBAC, so you can check with staff about that if you have questions. The main thing you need to know about public meetings law is that for a law to comply with public meetings law, there has to be notice of the meeting. the public has to be able to attend, not necessarily participate, but at least You have to take minutes. Decisions have to be recorded. So, there's a lot of requirements for public meetings. Staff will take care of those. But what you all need to be careful about is that a meeting is not just when you're all in the same room or when we're all on a Zoom call. It can also include emails or text messages. Any way of communicating between a quorum of the CBAC could qualify as a public meeting. So I've got on here including through Serial communications that could take different forms. For example, if person A goes to person B and says, "Hey, I'm going to vote yes. Are you going to vote yes?" And person B says yes. And then person B goes to person C and says, "Hey, and B, we're both voting yes. How are you going to vote?" you've now got a serial communication or maybe a more realistic example, you've got an email spread with all the members of your CBACK on it and you all are sending emails back and forth about SEBAC business, you may be potentially violating public meetings law. and then through an intermediary could be through staff, right?

So, if you communicate something to a staff member, then they go down the line and are communicating around your decisions or deliberations, you could potentially have a public meeting violation. So, you really want to be careful about communications between a quorum that occurs outside of a meeting regardless of how those communications occur.

Political Activity

And then the last piece is political activity. This is pretty narrow as to you all and we just made it through an election but it feels like it's always election season anymore. So just for you all to be aware of this. The rule for appointed volunteers like you all is that when you're acting in your official capacity, you can't promote or oppose or direct a public employee. So our staff can't oppose an initiative, referendum, recall petition, measure, candidate or political committee. Most political things, right? This is pretty limited for

you all. It really only applies when you're acting in your official capacity, which means when you're at a CBAC meeting, working on a duty assigned by the CBAC or appearing at an event in your official capacity for the CBAC. So, the way this might come up is if you're at a CBAC meeting and you say, "Hey, we're looking at our budgets here and again, we just had an election, but you could have a scenario where you say, we've got this election coming up and we know this candidate would really support this budget item that we're interested in. So, I hope everyone is going to vote for that candidate because that would be a great thing for what we're trying to advance as a county."

That would be a violation of the restriction on public employee political activity. So, again, this is narrow for you all, but it's really just to be careful about what you're advocating for or against when you're at a CEAC meeting if it's anything that's on this list. It could be that you're in a CBAC meeting and you say, "Hey, on my way in, this person asked me to sign this initiative petition. It seems really great. I hope you all will sign it on your way out when you see the person." that could be a violation if that was during the meeting. So, you just want to be mindful of this when you're acting in your official capacity. And then these are a bunch of resources I would recommend that you check out. particularly the Oregon Government Ethics Commission. They have a guide for public officials that lays out all the ethics rules. They've got examples in there and it's really clear and straightforward. So, I recommend you check that out.

They also have public meetings trainings. They have these great webinars that are on their website. They're free. Anyone can attend them. we strongly encourage that you consider attending one of those. And then a few other resources here. so that was my speed round version of public records, public meetings, ethics, and political activity. again, I do want to emphasize that these are personal responsibilities for all of you. And so, it is really important that you go do some homework, that you not say, great, done, check that box, but that you go actually check out those resources.

If anything I said tonight made you think, I know we're short on time, so whoa, I have a question about that or I didn't catch that piece, please follow up with one of your staff contacts and they can always reach out to us. or they may be able to answer it themselves because they're also public officials and so they're also very familiar with these rules. So, thank you all so much for your time. I didn't see any questions. I know again that it was very fast.

Amara Pérez: Any questions for Katherine? thank you so much for your presentation and all the presentations that we had today are so much appreciated.

Closing

Amara Pérez: Just for the final slides for us you're going to be getting a link in the chat at this point. I think Ka will be putting a link in the chat. This will be your official SEBACK participant resource packet and we'll go back and add the recording of the meeting and presentations that were given today so that you will always have this at your fingertips. And we're going to send an email after this so that you'll have a copy of this as well. And then the other thing we would just love is folks before you take off if you could take one minute to let us know how the onboarding session was, what was helpful, what you'd like to see that would improve the onboarding session in the future. So there's a link right here in the chat if you want to take a minute to fill that out, but we'll also be sending that in a follow-up email. So your feedback on this session will be invaluable to us as we continue to improve the overall c experience. Any final takeaways or highlights? Anybody want to share your highlights for this evening? Tammy, that was

- **Tami Wallis:** I learned so much about the law and public records and all of it and I found it so fascinating. So, thank you. I really appreciated that.
- **Amara Pérez:** Tmy. Thanks for saying that. Madison, thank you so much. This is not my first Seback intro, but it's definitely been my favorite. Yay. Thank you, Madison. Thanks for saying that. Anyone else?
- **Jonathan Livingston:** Add I'm excited about the resources around public meetings and potential training on that. I just want to shore up my knowledge a little bit, make sure I understand and can be supportive of the CVAC.

Amara Pérez: Any other final takeaways, highlights? Tammy, my third budget equity meeting and they are both so wonderful. and I see some folks have turned in their feedback. thank you so much. Really appreciate that. Means a lot to us.

Amara Pérez: All right, and we're 10 minutes early. Love that. Thank you all so much. We really appreciate you taking the time to be here tonight getting oriented and onboarded to your role. Know that you have a team of people that are here to support you. If you have any questions at all or need any support, please don't hesitate to let us know. So, thank you all. Have a lovely night and a Happy Friday tomorrow.

Bye. Thank you all. Hey

Meeting ended after 01:49:22 🙌

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CHAT TRANSCRIPT:

00:14:54.237,00:14:57.237

KellyAnn Cameron: Katherine is coming at 6:20, also!

00:29:26.181,00:29:29.181

Amara Pérez: Thanks for your question Ben

00:33:28.994,00:33:31.994

Mallette Faherty: How is preschool for all doing?

00:38:03.742,00:38:06.742

Mallette Faherty: How we been using these metrics so far? Or is this new?

00:45:58.877,00:46:01.877

Amara Pérez: The Board's YouTube channel, www.youtube.com/c/MultCoBoard

00:57:48.632,00:57:51.632

Bill Boyd: Do you know when Metro will make formal projections on SHS funding for FY2026?

01:19:28.954,01:19:31.954

Joy Fowler: Feel free to place your questions in the chat

01:28:08.353,01:28:11.353

Renai Bell: not a question, just a thank you - this is super helpful!

01:34:34.388,01:34:37.388

Renai Bell: are your slides supposed to be advancing?

01:34:37.240,01:34:40.240

Gwyneth W. Punsoni: I think you're sharing the wrong screen.

01:45:21.339,01:45:24.339

Renai Bell: thank you Katherine!

01:45:31.117,01:45:34.117

Tami Wallis: thank you alllllll!!!!!!

01:45:33.561,01:45:36.561

Jonathan Livingston: thank you!

01:46:05.028,01:46:08.028

KellyAnn Cameron:

<https://www.multco.us/oci/cbac-participant-resource-packet>

01:46:11.655,01:46:14.655

KellyAnn Cameron: ^Resource Packet!

01:46:34.731,01:46:37.731

KellyAnn Cameron: Feedback form:

https://docs.google.com/forms/d/e/1FAIpQLSe2V92alhz_AE4qSaYm5eDHYntrZ84AH1u4PZpzGK7Uj1qIZA/viewform

01:47:20.858,01:47:23.858

Madison Riethman: Thank you so much! This is not my first CBAC intro but it's definitely been my favorite :)

01:48:02.021,01:48:05.021

Kesean Coleman: Joy and Terralyn did amazing!

01:48:24.278,01:48:27.278

Tami Wallis: my third budget equity meeting and they are both so wonderful!

01:48:40.341,01:48:43.341

Denell Broncho: Thanks to all of the presenters. Such good information.

01:48:44.008,01:48:47.008

Joy Fowler: Thank you so much...

01:48:52.894,01:48:55.894

Bill Boyd: Thank you

01:49:08.041,01:49:11.041

Terralyn Wiley: Thank you all!!