

# INSERT Department Name



TO: Chair Jessica Vega Pederson  
Chris Fick, Chief of Staff  
Serena Cruz, Chief Operating Officer  
Christian Elkin, Budget Director

FROM: Department Director Name, Department Name

DATE: February 12, 2024

RE: FY 2025 Budget Submission Transmittal Letter

*[General instruction: The transmittal letter formally conveys the department's budget request to the County Chair. It should be used as a guide or map to the department's budget submission. Departments may need to add additional topics/areas as necessary to explain their budget. **Please keep in mind that this template is updated every year, so departments will want to read all the bullets to make sure they are covering key points.]***

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## Department Overview

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- Briefly explain the main work of your department and its role at the County.
- Explain how your department contributes to achieving the County's [Mission, Vision, and Values](#).
- Concisely articulate the long-range goals that guide the direction for the department's programs and services.
- Identify key successes of the **current** fiscal year.
- In this section and throughout this letter, keep in mind that department transmittal letters will be posted online; please provide adequate context to ensure that readers beyond the Chair will understand the discussion.

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## Diversity, Equity, and Inclusion Efforts

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- Describe the department's mission, vision, and/or values as they relate to diversity, equity, and inclusion efforts. Include information about the department's efforts to better serve customers, clients, and community.

- Describe how the Workforce Equity Strategic Plan’s goals and action items are being supported and prioritized within the department and how the department inclusively leads with race both internally with staff and externally with clients and community.
- Describe the overall role and goals of your Equity Team within the department, including how the equity manager engages with the rest of the department’s leadership.
- Describe how the department has incorporated an equity lens in budgetary decision-making and specifically how equity considerations informed development of proposed reallocations, reductions, increases, restorations, and new program offers (whether ongoing or one-time-only).
- Describe the process and tools your department and equity manager are using to evaluate your program offers, including processes or tools under development for future use.
- Describe how your departmental Equity Team was involved in the budget process.
- Describe whether and how your department engaged the community with respect to program offer development/decisions.
  - Did the department reach out to community partners for input?
  - Did the department elicit and consider feedback from its Community Budget Advisory Committee (CBAC)? (CBACs have indicated that, in the past, they have often been engaged for input *after* the Chair’s budget is released, whereas they want to be consulted *before* that step of the process.)
- Describe where your department requires additional resources or support to incorporate and evaluate diversity and equity in your budget. For example, if you are unable to answer relevant questions raised in the [FY 2025 Budget Equity Tool](#), describe the barriers to providing that information.
- **FY 2025 equity budget:** Please provide a table of the equity positions and other equity-related funding like professional services, training, etc., including budget items supporting the positions, that are included in your budget submission.

FY 2025 Equity Budget				
Offer Number	Program Name	Equity JCN & Position Title or Budget Category	Total Funds*	FTE
<b>Total</b>				

\* Equity investment may only represent a portion of the total program offer budget.

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## FY 2025 Budget Priorities and Key Issues

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- Identify and explain key policy priorities.
- Explain budget priorities and values and describe how they can be measured and/or data-driven.
- Identify issues and challenges that span multiple budget years and suggest strategies to deal with them.
- Note emerging issues that have gained importance over time and identify program offers that specifically address them. If no program offers address the emerging issues, explain why.
- **Chair’s Budget Focus on “One-County” Solutions:** Where relevant, explain how the department is coordinating with other departments to develop “one-county” solutions to fill the gaps our community faces. This section can reference existing programming for context, but the focus should be on new investments, reallocations, or approaches, highlighting information on specific programs and expected outcomes. The descriptions should directly connect to the department’s and County’s overall strategy, and include program specific information for your department (Program Offer Number, Total Dollar Request, Total FTE, Performance Measure Targets), as well as references to other departments’ relevant program offers. Key cross-departmental issues to address include:
  - Response to our housing and homelessness crises,
  - Approach to community safety, and
  - Need for increased behavioral health support.
- Give the strategic context for the department’s budget submission.
- Explain how programs and services help the department reach long-range goals.

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## Budget Overview

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The Department of X budget submission totals \$X and X.XX FTE for FY 2025 for both in and out of target programs. In target programs are funded within the department’s General Fund target allocation or by Other Funds; out of target programs are additional requests not funded within the department’s General Fund target allocation. The submission is detailed in the table below showing the total allocation.

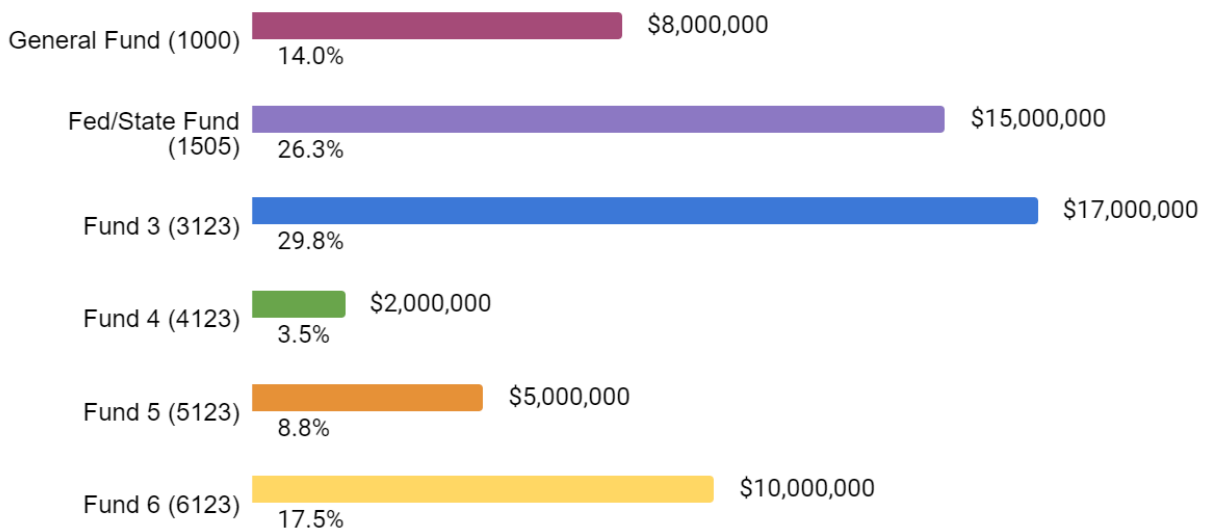
FY 2025 Dept. X Budget Submission				
	FY 2025 General Fund*	FY 2025 Other Funds	Total Funds	Total FTE
In Target Programs				
Out of Target Programs				
<b>Total FY 2025 Submission</b>	<b>\$</b>	<b>\$</b>	<b>\$</b>	

\*Includes both the General Fund and Video Lottery Fund.

*[Department Instructions for the table: the "in target" total for FY 2025 General Fund must not exceed the GF target allocation amount.]*

The Department of X is primarily funded by [insert appropriate statement: General Fund, Federal/State Funds, a balanced mix of both?]. The bar chart below shows the budget by fund for **in target programs**.

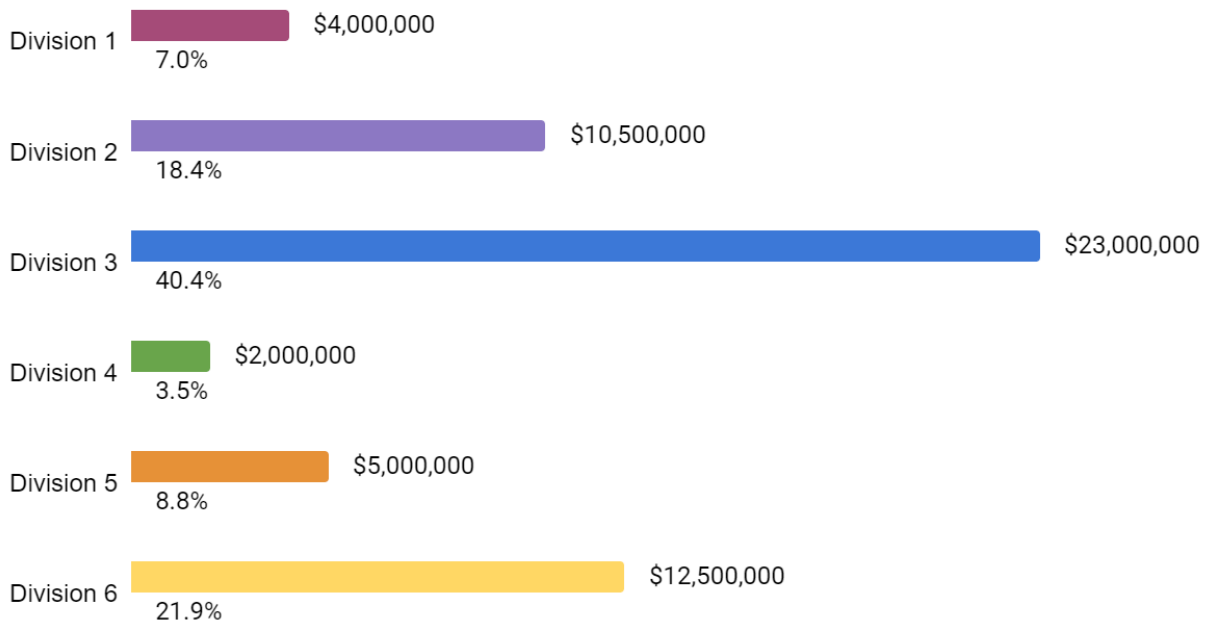
### FY 2025 In Target Budget by Fund \$XXX,XXX,XXX



*[Department instructions for bar chart: Use a copy of the [FY 2025 Transmittal Letter Spreadsheets](#) Google spreadsheet to populate the chart information and copy/paste the chart into this Google Doc. You can add or delete rows, change the existing text/numbers, etc. Please refer to funds by name (a shortened or abbreviated name is acceptable if it will be generally understood), rather than by number. If you have too many 4-digit funds to fit legibly in the bar chart, or need to show them in a different way, please work with your Central Budget Office analyst. The \$ amount you insert in the title should tie to the table above.]*

The Department of X has Y divisions, with the **in target budget** distributed as shown in the bar chart below.

### FY 2025 In Target Budget by Division \$XXX,XXX,XXX



*[Department instructions for bar chart: Use a copy of the [FY 2025 Transmittal Letter Spreadsheets](#) Google spreadsheet to populate the chart information and copy/paste the chart into this Google Doc. You can add or delete rows, change the existing text/numbers, etc. The \$ amount you insert in the title should match the preceding bar chart.]*

This budget maintains/supports the department and continues the core work by:

- Insert 5 to 8 bullet points highlighting the core work of the department that is maintained in the FY 2025 budget.

## General Fund Target Allocation

- Summarize how the department proposes to meet its General Fund target allocation. Include reallocations and reorganizations of services, including how they impact core services and vulnerable community members.
- Explain the impacts of the proposed changes as they relate to gains or losses to outcomes and how the department can provide the most effective impact given any reductions in spending or programming.
- Describe overall equity impacts to programs, workforce, and/or client communities (see the [FY 2025 Budget Equity Tool](#), particularly the “Department level” section for ideas).
- Summarize the General Fund relationship to other funding sources and any significant changes.

## General Fund Reductions

Proposal for Reductions to Meet FY 2025 General Fund Target Allocation			
Offer Number	Program Name	General Fund Reduction	FTE Reduction
10001	Program 1	(20,000)	0.00
10002	Program 2	(175,000)	-2.00
<b>Total</b>			

- For major reductions to a single program, create an individual bullet that very briefly describes the program and then focuses on describing the impacts to services, program outcomes, equity impacts, and rationale for cuts.
- For eliminated programs, create individual bullets that very briefly describe each program and then focus on describing the impacts to services, program outcomes, equity impacts, and rationale for cuts. Also, identify whether the program is being submitted out of target and any impacts to matching or other funds.
- For equity impacts, provide relevant responses to questions raised in [FY 2025 Budget Equity Tool](#) such as: who will bear the burden of the proposed reduction/cut, what are the demographics of participants and staff directly impacted by the reduction/cut, whether those most likely to be impacted have been engaged in the process, and

whether the reduction impacts the department’s goal of advancing equity. Also, identify any impacts to matching or other funds.

## Reallocations

FY 2025 Significant Departmental Changes (Reallocations)				
Offer Number	Program Name	General Fund	Other Funds	FTE
10001	Program 1	(20,000)		0.00
10002	Program 2	(175,000)	(50,000)	-2.00
10003	Program 3	195,000	50,000	
<b>Total</b>				

The following bullets should be discussed as part of this section:

- If General Fund resources are significantly reallocated, describe the reason for the reallocation and impacts to services, program outcomes, and equity. How were equity principles considered in the reallocation?
- Describe the General Fund relationship to other funding sources and any significant changes.
- For new, expanded, reconstituted, or alternative programs within the General Fund target allocation, create an individual bullet for each program describing the services, program outcomes, equity impacts, and rationale for the addition. If applicable, describe the services the program offer is replacing. How will the changes reduce disparities and impact outcomes for Black, Indigenous, communities of color, and other marginalized communities?
- For programs that are significantly reduced or eliminated in order to add or expand other programs, create an individual bullet for each reduced/eliminated program describing the impacts to services, program outcomes, equity impacts, and rationale for cut. For equity impacts, provide relevant responses to questions raised in the [FY 2025 Budget Equity Tool](#) such as: who will bear the burden of the proposed reduction/cut, what are the demographics of participants and staff directly impacted by the reduction/cut, whether those most likely to be impacted have been engaged in the process, and whether the reduction impacts the department’s goal of advancing equity. Also, identify any impacts to matching or other funds.
- If any programs include a request to add internal services, describe the request and how it’s being funded.

## Out of Target Requests

### Ongoing Out of Target Requests

The following table lists the [Name] Department’s ongoing out of target requests in order of priority:

FY 2025 Out of Target Requests (Ongoing)						
Priority	Offer Number	Program Name	General Fund	Other Funds	FTE	New or Existing
1	10001	Program 1	120,000	0	1.00	New
2	10002	Program 2	75,000	10,000	0.50	Backfill
3	10003	Program 3	200,000	0	0	Existing
	<b>Total</b>					

- List the requests in order of priority.
- Explain the rationale behind each new, innovative, or alternative program offer and describe any existing services they are replacing. Include information on equity considerations for the requested program (both impacts and involvement of relevant community in the design).
- For existing program offers submitted out of target as a backfill request (i.e. using General Fund to support a program previously funded by a different source in the prior fiscal year), label the request as backfill and describe the program outcomes, clients, and communities served; other programs providing similar services; and impacts of discontinuing the program. Use the same approach to label restoration requests.
- If any programs include a request to add internal services, describe the request and how it’s being funded.



## One-Time-Only Out of Target Requests

The following table lists the [Name] Department’s one-time-only out of target requests in order of priority:

FY 2025 Out of Target Requests (One-Time-Only)						
Priority	Offer Number	Program Name	General Fund	Other Funds	FTE	New or Existing
1	10001	Program 1	120,000	0	1.00	New
2	10002	Program 2	75,000	10,000	0.50	Backfill
3	10003	Program 3	200,000	0	0	Existing
	<b>Total</b>					

- List the requests in order of priority.
- Describe the program outcomes, clients, and communities served, and justification for the one-time-only request. Include information on equity considerations for the requested program (both impacts and involvement of relevant community in the design).
- Explain the associated ongoing or future costs, including those for maintenance, staff, and licenses; and explain how the department will support these in the future.
- In the unlikely circumstance that you are requesting one-time-only out of target funding for an existing program offer (such as for a program that is ramping down or as a bridge to increased Other Funds in FY 2026), label the request as backfill and describe the program outcomes, clients, and communities served; other programs providing similar services; and impacts of discontinuing the program.
- If any programs include a request to add internal services, describe the request and how it’s being funded.

## Voter Initiatives - (SHS, PFA, Library Bond)

FY 2025 Voter Initiatives - [ <i>choose one: SHS/PFA/Library Bond</i> ]				
Offer Number	Program Name	Initiative Funds	FTE	New or Existing
10001	Program 1	120,000	1.00	
10002	Program 2	50,000	0.50	
<b>Total</b>				

- If you are the coordinating department for the Metro Supportive Housing Services (SHS) Measure, Preschool for All (PFA), or Multnomah County Library General Obligation Bond, explain the assumptions used and any major increases or decreases in revenue sources
- If you are the coordinating department for SHS, PFA, or the Library Bond, or you are a department receiving support from a coordinating department, identify the relevant program offers for your department and how they are in alignment with the overarching program goals for SHS, PFA, or the Library Bond.
- Explain how your department coordinated with other departments to develop these programs (i.e. if you are the coordinating department - such as JOHS for SHS, explain your process of working with departments receiving funding; if you are the department receiving funds, explain how you worked with the coordinating department and other departments).
- If your department has program offers addressing more than one voter initiative, provide a separate table and set of bullets for each initiative.
- If your department does not have any SHS, PFA, or Library Bond programs, please delete this section.

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## State, Federal, and Other Funds

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FY 2025 Other Fund Changes					
Offer Number	Program Name	General Fund	Other Funds	FTE	GF Backfill Requested
10001	Program 1		120,000	1.00	
10002	Program 2		(50,000)	-0.50	45,000
<b>Total</b>					

- Explain the assumptions used and any major increases or decreases in revenue sources. Include a very brief explanation of what the revenue is. Identify and describe any matching funds that are at risk.
  - For revenue sources that cross departments, confirm that the other departments are using the same assumptions.
- Explain major changes in State funding assumptions and how they impact program operations and outcomes; describe any equity impacts resulting from the changes.
- For programs with General Fund backfill, provide an explanation of services to be bought back, FTE changes, equity impacts, and changes to program outcomes. Were equity principles used to decide which programs to backfill and the design of those programs? If so, how? State whether the backfill request is in target or out of target. (If out of target, remember to include it in the relevant out of target table.) If no backfill is requested, feel free to delete the column.
- If any programs include a request to add internal services, describe the request and how it's being funded.

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## Other Significant Program Changes

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- Identify and explain any programs from FY 2024 that are not included in the FY 2025 budget.
- If relevant, use this section to describe significant mid-FY 2024 changes that impacted the department and will not otherwise be evident from other sections of this letter.

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## Risks and Other Issues

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- Optional space to describe other impacts to the department in FY 2025.
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## Division Level Organization Chart

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- **Describe any changes in organizational structure and management.** Include an organization chart down to the division level; below is a template to demonstrate the desired information. Dollars and FTE shown in the chart should be only the *in target* items. The Budget Office will include a simplified version of the chart in the published budget. For an example, please see the [FY 2022 DCHS Transmittal Letter](#).
- **Include the span of control ratio for the divisions.** Discuss any changes from last year. Instructions on how to calculate the span of control are at [multco.us/file/33777/download](http://multco.us/file/33777/download).
- Please keep in mind digital accessibility issues such as [color contrast](#) in the organization chart (and in other charts/tables in this letter).

