



FY 2027 Budget Equity Tool

Multnomah County's budget is deeply rooted in our values, our vision and our priorities. It reflects our moral compass, implements our strategic plan, tells the story of how we intend to put our words into action, and details how we serve our community while addressing the County's most pressing issues. It's critical that the investments we make through our budget decisions advance our work of closing the pervasive and persistent disparities we see across our community.

Systemic and institutional inequities are the result of intentional choices and practices. Over the last several years, the impacts of the global COVID-19 pandemic, climate change, inflation, housing affordability, and other crises have disproportionately harmed Black, Indigenous and other communities of color. These challenges have shined a light on the deep and damaging inequities that we must work to replace with a culture of equity. That transformation requires choices and actions that are just as, if not more, decisive and deliberate as those that built them.

Multnomah County has repeatedly shown that it can take the lead in pushing our community toward a more just and equitable place. In 2021, through a unanimous vote by the Board of County Commissioners, the County declared racism a public health crisis. It was stated that, "As a public health authority and the largest provider of safety net services in the state, Multnomah County is uniquely positioned to create the conditions that contribute to people's health by actively identifying where systemic racism is hurting individuals and our community at large, intervening where we can to stop it, and redressing those harms using the tools available to us."

The declaration doesn't just formally identify an injustice that results in harm to the people we serve. It also creates clear and — crucially — actionable pathways to address systemic oppression using the County's many tools, while committing our entire organization to an approach that can be utilized across all our departments.

Since the FY 2022 budget cycle, Multnomah County has provided countywide guidance on the application of equity concepts to budgeting with guidance from the Office of Diversity and Equity, departmental Equity Managers, and the Budget Office.

For the FY 2027 budget, the expectation is that all departments have involved their Equity Manager (or equity leaders) in budget planning and development.

As an ongoing commitment, there are key areas of focus to meet budget expectations:

1. providing robust information at the program level to inform elected decision makers and the community of program objectives and service delivery models;
2. data and outcome measures at the division level designed to uncover and address racial and other disparities; and
3. aligning program offers, department and division narratives, and transmittal letters with department- and County-level commitments to advancing equity.

Three Key Focus Areas

1. Focusing on process and practices at the program level

This focus area could include using data to assess racial disparities for client populations, meaningful engagement/client feedback for quality improvement, and targeted culturally specific strategies and programmatic design.

As you think through your program offers, you may want to consider questions such as:

- a. What is the program goal (short/long term)?
- b. What does this program do (what are the operations of this program)?
- c. Identify the target population that this program seeks to serve -- What are the demographics of program participants? Is the program designed to address racial or other disparities?
- d. How have we applied the Equity and Empowerment Lens?:
 - i. How can you use demographic data (race, ethnicity, income, geography, age, disability status, etc.) to understand the population(s) experiencing the greatest disparities related to the program's intended results?
 - ii. Is the burden of the problem the program addresses (e.g., poor health, lack of access to jobs, unsafe environment) experienced equally by all groups in the community?
 - iii. Who primarily benefits from the program's activities? Who may be unintentionally burdened by the program's activities (e.g. regulatory impact, fee structure)? Does the program's funding model or service delivery disproportionately help one group while unintentionally harming another?
 - iv. Is there a specific, measurable change this program will achieve in reducing a documented disparity for the target population? If successful, will this program close a specific equity gap?
- e. Where is the program located or do program participants typically reside in certain areas of the county?

- f. How do people access this program? What is the intake process? Are there eligibility requirements?
- g. Have there been any major changes or are there anticipated changes?
- h. How have clients/consumers/those in our care influenced the programmatic design?

Being mindful of these questions can help ensure that programs are responsive in the short and long term to demographic shifts, disparities data, and client/consumer feedback to improve our program delivery and results for our clients.

2. Division-level data and Key Performance Indicators (KPIs)

In FY 2026, departments were asked to develop outcome statements for each division. Administrative divisions were excluded. In FY 2027, all divisions, including administrative divisions, will be required to submit one to four division outcome statements. Additionally, each outcome statement should be measured using one to four Key Performance Indicators (KPIs). Program Offer performance measures should continue to focus on output measures, except for offers in departments that don't have divisions (i.e. Nondepartmental) or countywide program offers -- those will continue to use both outcome and output measures. All this information together will help us understand whether the programs we fund are getting the best results for the investment.

As you develop your division outcome statements and KPIs, you may want to consider questions such as:

- a. What adjustments/additions could be made to how outcome statements are measured to help us make more informed decisions about our effectiveness regarding inclusion or racial justice?
- b. What data do you use to analyze racial disparities for your service population(s)?
- c. How can your data be broken down by demographics such as race, geography, etc.?
- d. Are there gaps in data collection and how could they be resolved?
- e. What does the disaggregated data reveal about how equitably your services are being delivered?

3. Department level

Departmental budgets reflect its overall strategy, how the department approaches equity and overall department goals/results in addition to explaining how our organization is working to address specific issues and experiences in our community. Multnomah County has consistently asked departments, in their departmental transmittal letters, and department and division narratives, to incorporate and describe the ways that their departmental budgets reflect our organizational commitment to advancing equity. This is important, and informs the narrative of how the cumulative effect of County programs can advance racial equity and

eliminate disparities. Developing program offers, department and division narratives, and transmittal letters with equity in mind, allows the connection between program and departmental budgets to be clearer.

As you think through your program offers, transmittal letters, and department/division narratives, you may want to consider questions such as:

- a. What was your department's decision process? Who was involved? How was equity considered?
- b. How was your Equity Manager involved in the budget process? How was your departmental Equity Team and/or Community Budget Advisory Committee involved in the process?
- c. If reductions are proposed, who will bear the burden of a proposed spending reduction or program cut? What are the demographics of participants and staff directly impacted by a budget reduction?
- d. If proposing increased funding or new funding, how did you determine how to spend any additional funding? Is increased funding being allocated to target disparities?
- e. If General Fund resources are significantly reallocated, how did you make that determination? What are the impacts of the reallocation on services, program output measures, and division key performance indicators? How were equity principles considered in the reallocation?

We also encourage you to build capacity to support equity in budgeting in your department. You may want to consider:

- a. Providing technical training on Budgeting 101 and the program offer process. Please reach out to Budget Director Christian Elkin for assistance.
- b. Providing technical training on Equity Analysis. Please reach out to your Equity Manager, or directly to Interim Chief Diversity and Equity Officer Trisa Kelly for assistance.
- c. Requesting Department Directors and Equity Managers to assist in identifying pilot programs/processes/tools for the FY 2027 budget.

Additional Equity Questions

General Review and Reflection

- Do you understand what this program offer is about? (This question can be used when having someone outside your division review your program offer.)
- Could you describe the program offer to the Board, a community member, or another employee? (This question can be used when having someone outside your division review your program offer.)
- How does this program offer align with our organizational values of safety, trust and belonging?
- What feedback would you offer regarding this program offer to budget decision-makers about the County's racial equity/inclusion values?
- How does this change in spending impact our ability to achieve our racial equity goals? ([GARE](#))
- Does a shift in spending disproportionately benefit or hurt specific groups in our community? ([GARE](#))
- What steps have we taken to ensure that the budget decision does not cause disproportionate harm to any groups in our community, or perpetuate existing racial inequities? (<https://www.racialequityalliance.org/resources/gare-resources>)
- Do the staff or officials involved in the decision-making process provide diverse racial perspectives? ([ELGL](#))
- Might the proposed spending change have negative long-term impacts on communities who have been hit hardest by the COVID-19 pandemic? ([ELGL](#))
- How can the department/division budget be balanced in a way that protects efforts to work towards racial equity? ([ELGL](#))

Impacts

- How does this program offer show tangible commitments to inclusion and racial justice?
- What are the impacts of these budget choices on our staff?
- What are the impacts of this program offer on our staff/workforce?
- What are the impacts of this program in our community?

Measurements

- How are the division outcome statements measured?
- What adjustments/additions could be made to how the division outcome statements are measured to help us make more informed decisions about effectiveness in achieving our goals?
- What adjustments/additions could be made to how the division outcome statements are measured to help us make more informed decisions about effectiveness in achieving our goals with regard to inclusion or racial justice?

- What adjustments/additions could be made to how the division outcome statements are measured to help us make more informed decisions about effectiveness in achieving our goals with regard to safety, trust and belonging?

Budget Reductions or Reallocations

- How does this reduction or reallocation impact programs and/or services that are vital to communities of color and/or people living with a disability?
- What is the impact on employees of color and/or employees with a disability?
- Does this reduction or reallocation impact the department's goal of advancing equity?
- How have those most likely to be impacted been engaged in the process? ([ELGL](#))
- Who will bear the burden of a proposed spending reduction or program cut? ([ELGL](#))
- Who will bear the burden, and who will benefit, from a proposed reallocation?
- Are there specific groups that depend on services that will be eliminated by a budget cut or reallocation? ([GARE](#))