FY 2028 Budget Equity Tool

Multnomah County's budget reflects the County's values, strategic plan, and priorities. It describes how the County strategically allocates resources, delivers services, and responds to its most pressing issues. Budget decisions are also one of the main ways the County works to reduce disparities in outcomes and access across the community.

Many Multnomah County residents face barriers to health, housing, and economic stability, and recent conditions have made those barriers harder to overcome. The COVID-19 pandemic, inflation, rising housing costs, and the effects of climate change have placed added strain on residents who already had fewer resources and less access to services. As a public health authority and the largest provider of safety net services in the state, the County has a role in identifying where its policies and programs contribute to unequal outcomes, changing them where it can, and addressing the harms that result. Budget decisions are one of the main ways the County does this, and the approach applies across all departments.

The County has committed to identifying where its policies and programs contribute to harm, and to addressing those harms using the tools available to it. This approach applies across all departments. In the budget process, it means asking who a program serves, who faces barriers to reaching it, and whether outcomes differ across the community. Answering these questions with data helps decision makers understand how a proposal affects residents before funding is allocated.

As a critical part of our budget process, Multnomah County continues to provide 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 2028 budget, departments must ensure that their Equity Manager (or equity leaders) is included 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 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 disparities for client populations, meaningful engagement/client feedback for quality improvement, and targeted culturally responsive 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 unmet needs that this program seeks to serve -- What data supports this? What disparities are the program designed to address?
   d. How have we applied the Equity and Empowerment Lens?:
      i. How can you use available data (such as income, unmet needs, geography, language access, disability access, housing status, or service use) to understand which residents face the greatest barriers to the program's intended results? Describe what the data shows and any gaps in the data.
      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)**
Every division must have outcome statements. Each outcome is measured by Key Performance Indicators (KPIs). Program offers link directly to division outcomes, with performance measures focused on outputs. Together, this information shows whether funded programs are getting the best results for the cost.

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 fairness. What data do you use to analyze disparities in access or outcomes for your service population(s)?
b. How can your data be broken down by demographics such as income, geography, etc.?
c. Are there gaps in data collection and how could they be resolved?
d. 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 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 Chief Diversity and Equity Officer Laura Shepherd for assistance.
c. Requesting Department Directors and Equity Managers to assist in identifying pilot programs/processes/tools for the FY 2028 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.)
- How would 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 equity/inclusion values?
- How does this change in spending impact our ability to achieve our equity goals?
- How does a shift in spending disproportionately benefit or hurt specific community groups?
- 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 inequities?
- Do the staff or officials involved in the decision-making process provide diverse perspectives?
- Might the proposed spending change have negative long-term impacts on communities who have been hit hardest by the COVID-19 pandemic?
- How can the department/division budget be balanced in a way that protects efforts to work towards equity, inclusion and fairness?

Impacts

- How does this program offer show tangible commitments to equity, inclusion and fairness?
- 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 equity, inclusion and fairness?
- 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 underserved communities and/or people living with a disability?
- What is the impact on employees from underserved communities?
- 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?
- Who will bear the burden of a proposed spending reduction or program cut?
- Who will bear the burden, and who will benefit, from a proposed reallocation?
- Are there specific communities that depend on services that will be eliminated by a budget cut or reallocation?