



# **INTEGRATING EQUITY ANALYSIS & BUDGET PROCESS**

**Montgomery County Government  
Rockville, Maryland**

**Tiffany Ward, Chief Equity Officer, Office of Racial Equity & Social Justice  
Jennifer Bryant, Director, Office of Management and Budget**

# Legislation

- **Resolution 18-1095** adopted affirming the Council's commitment to creating a Racial Equity and Social Justice Policy Framework for Montgomery County (Adopted April 2018)
- **OLO Report 2018-8**, Racial Equity in Government Decision-Making: Lessons from the Field (September 2018)

# Legislation

- **Racial Equity Training** for County Leadership (January 2019)
- **Racial Equity Training - Debrief** for County Leadership (February 2019)
- **Racial Equity and Social Justice Act** (November 2019)
- **Bill 27-19, Administration – Human Rights – Office of Racial Equity and Social Justice – Racial Equity and Social Justice Committee Established** (Enacted November 2019)
- **Office of Racial Equity and Social Justice Established** (December 2019)

# Legislation

- **Chief Equity Officer** appointment confirmed (February 2020)
- **Bill 44-20**, Racial Equity and Social Justice – Impact Statements – Advisory Committee Amendments (Enacted December 2020)

# Implementation

- **Role of Office of Racial Equity and Social Justice**
  - Training and Facilitation
  - Provide Technical Assistance
  - Provide Opportunities for departments to share processes and remedies
  - Report annually on challenges and successes

# Applying a Racial Equity Lens - Incremental Steps

## ■ FY21 Operating Budget Development Process

- Provided a definition of equity
- Departments asked - How does this program promote equity?
- Departments encouraged to consider equity from various perspectives: racial, ethnic, socio-economic, linguistic, gender, age, disability, etc.
- Departments mapped their programs to the County Executive's Initial Seven Priority Outcomes and/or 21 key indicators

# Applying a Racial Equity Lens - Incremental Steps

- **FY22 Operating Budget Development Process**
  - Office of Management and Budget dedicated a section of the program proposal form to racial equity
  - Partnered with the new Chief Equity Officer/Office of Racial Equity and Social Justice
  - Integrate racial equity into department program proposals (budget requests) at the earliest possible phase of the budget process

# Applying a Racial Equity Lens - Incremental Steps

- **FY22 Operating Budget Development Process (*continued*)**
  - Provided a definition of equity, racial equity, equality, and social justice in guidance documents
  - Included guiding questions in the form:
    - Does your department use quantitative and qualitative data to track program access and/or service outcomes for different population groups?
    - Which community residents will potentially benefit the most from your program proposal or be burdened by your program proposal?
    - How does the program promote racial equity?

# Applying a Racial Equity Lens - Incremental Steps

- **FY23 Operating Budget Development Process**
  - Expand the development of a Budget Equity Tool
    - Refine existing guidance documents
    - Refine existing guiding questions
    - Include additional guiding questions
  - Provide a glossary of definitions related to equity

# Applying a Racial Equity Lens - Incremental Steps

- FY22 **Capital Budget**/Capital Improvements Program Development Process
  - Used equity data for use in FY22 Full CIP decision making related to project increases, reductions, deferrals
  - Collected data from
    - Maryland-National Park and Planning Commission
    - Metropolitan Washington Council of Governments (COG)
    - Montgomery County Public Schools (MCPS)
  - Utilized Geographic Information Systems (GIS)

# Applying a Racial Equity Lens - Incremental Steps

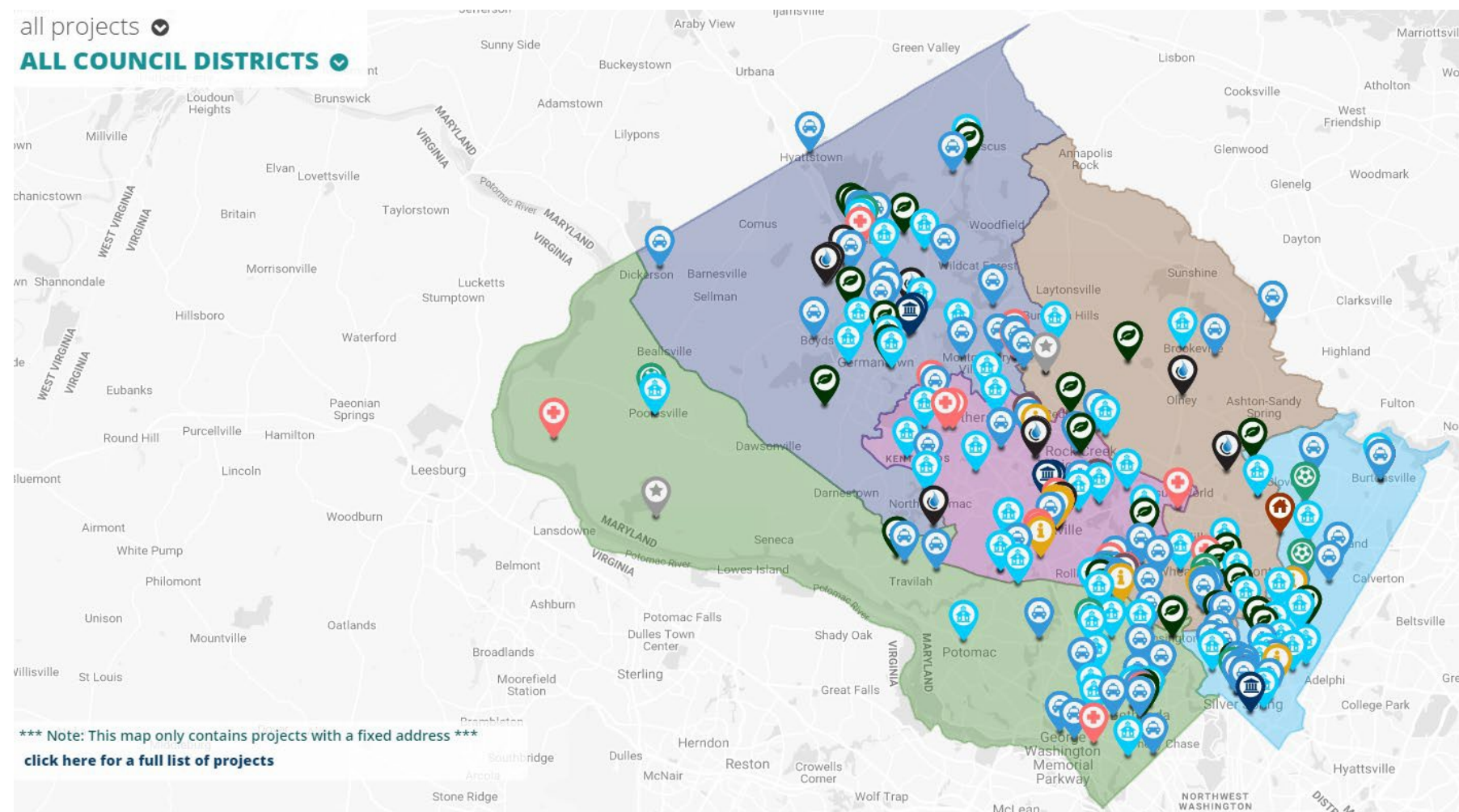
- FY22 **Capital Budget**/Capital Improvements Program Development Process (*continued*)
  - Created mapping tools and reports on a combined dataset with CIP Projects
    - MCPS' FARMS (Free and Reduced-Price Meals) and Ethnicity
    - Projects by 2018 Median Household Income
    - Projects by COG Equity Emphasis Area Census Tracts/Maps of CIP projects
    - Montgomery County's Census Tracts by COG Equity Emphasis Area & Ratio of Concentration (Regional & County Level)
  - Required departments to submit information about racial equity considerations when requesting FY22 CIP amendments

# Applying a Racial Equity Lens - Incremental Steps

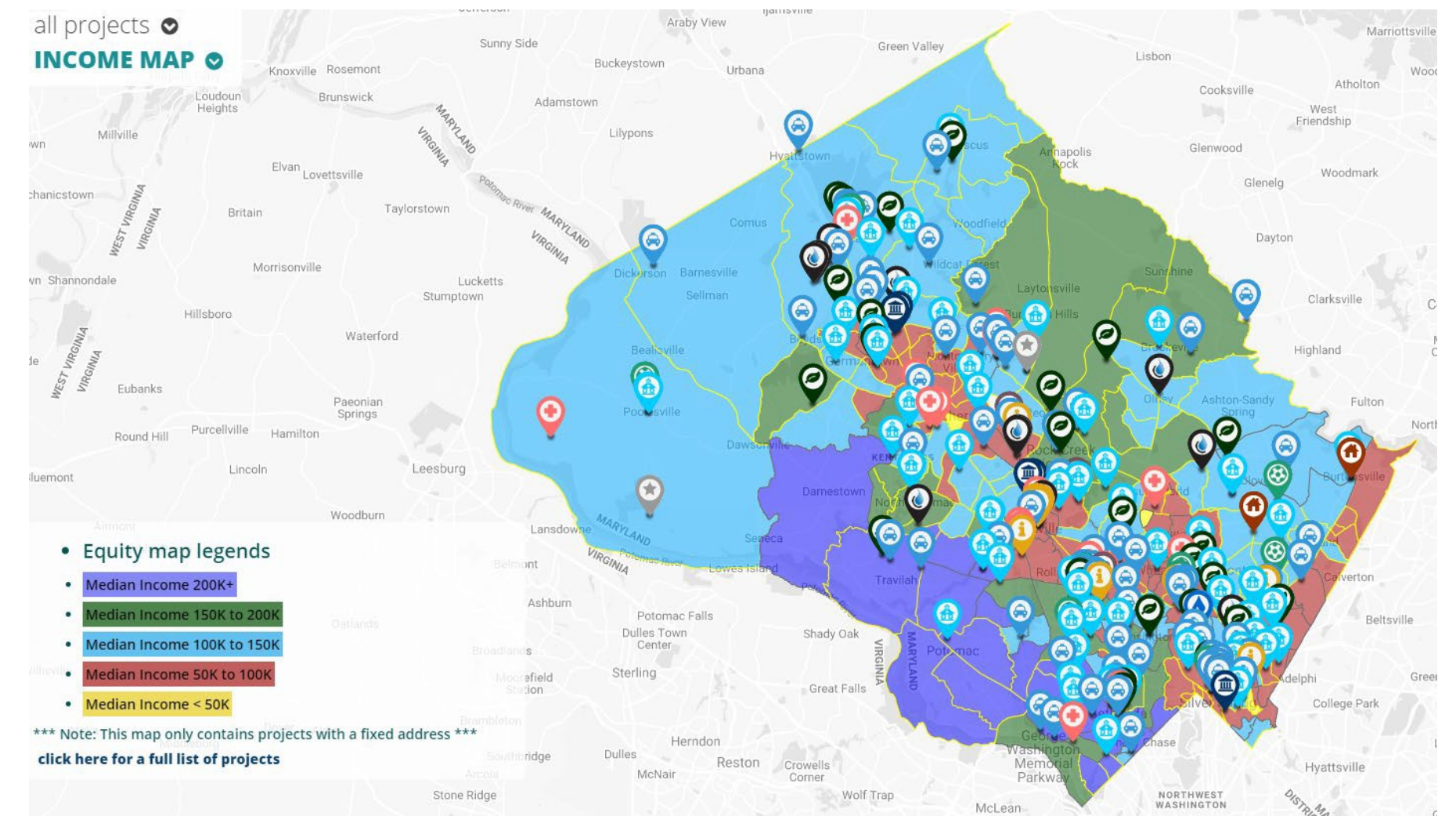
- FY23 **Capital Budget**/Capital Improvements Program Development Process
  - Pre-screening Process – integrate refined equity assessment
    - Ongoing/Maintenance Projects (LOE)
    - Stand Alone Projects
  - Expand the development of a Budget Equity Tool
  - Expand analysis to include all projects (including project not under construction)
  - Include review of department prioritization of subprojects
  - Provide a glossary of a definitions related to equity

# Capital Budget – Geographic Analysis

## FY22 Approved CIP Projects County Wide



## FY22 Approved CIP Projects & Median Income



# Forward Momentum

## Operating Budget & **Capital** Budgets

- Expand Development - Budget Equity Tool
  - Deeper Dive Questions (qualitative and quantitative data)
    - Who benefits?
    - Who is burdened?
    - Who is missing?
    - How do we know?
      - Data? Disaggregate data?
      - Community Outreach?
  - What can/did we do? What strategies do we need to develop to advance equity?

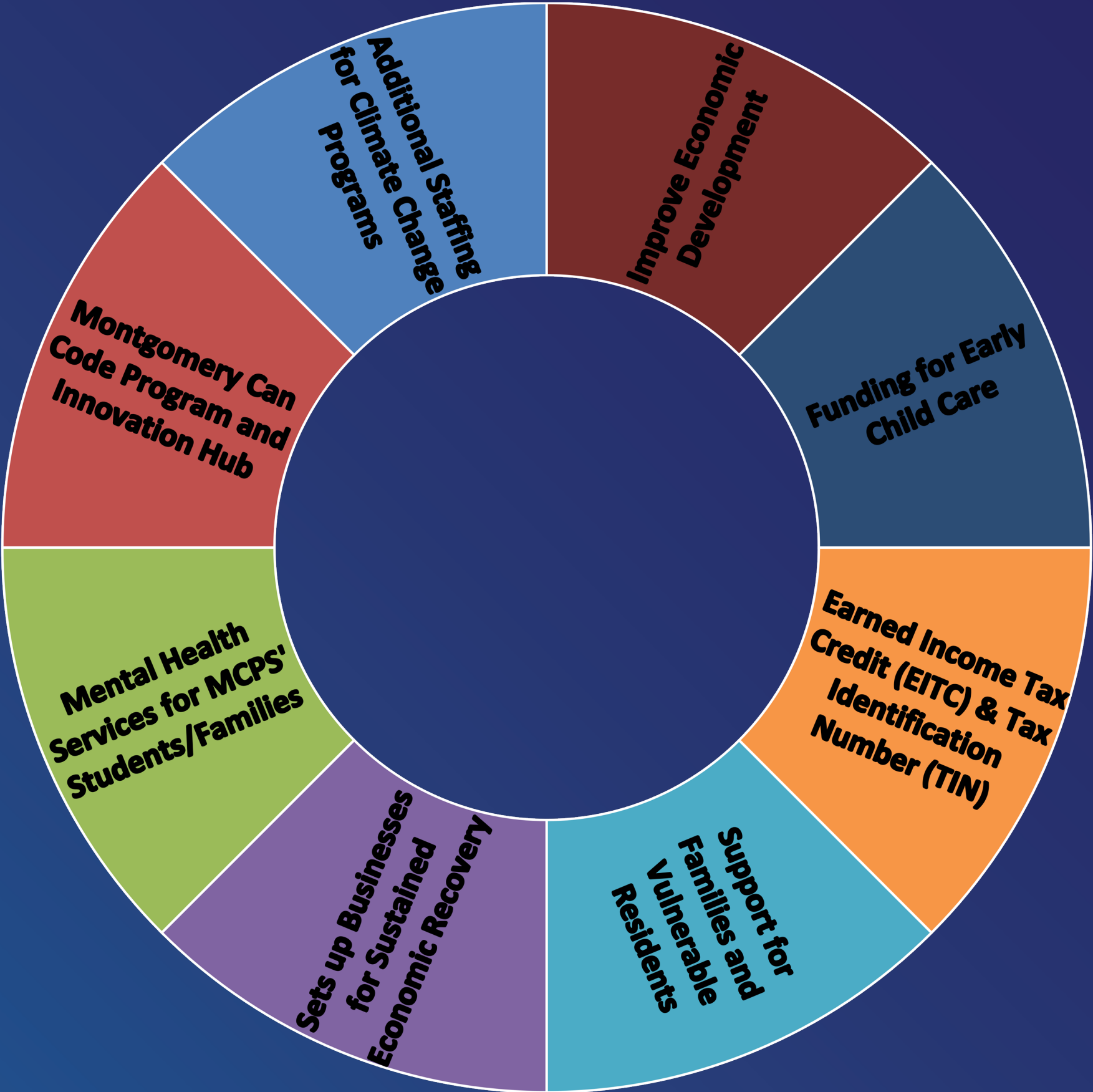
# A More Equitable County

## FY22 Approved Operating Budget & **Capital** Budgets

- Additional Resources and Personnel for the Office of Racial Equity and Social Justice
- Funds for a Mobile Health Clinic to Address Health Disparities
- Creation of a Multilingual and Multicultural Communications Unit
- Funds to Close the Digital Divide
- Fund Study to Reimagine Ride On Transit Network
- Advance Bus Rapid Transit Projects
- Fund health and service centers at schools with large concentrations of minority and low-income students

# FY22 Approved Operating Budget & Capital Budgets

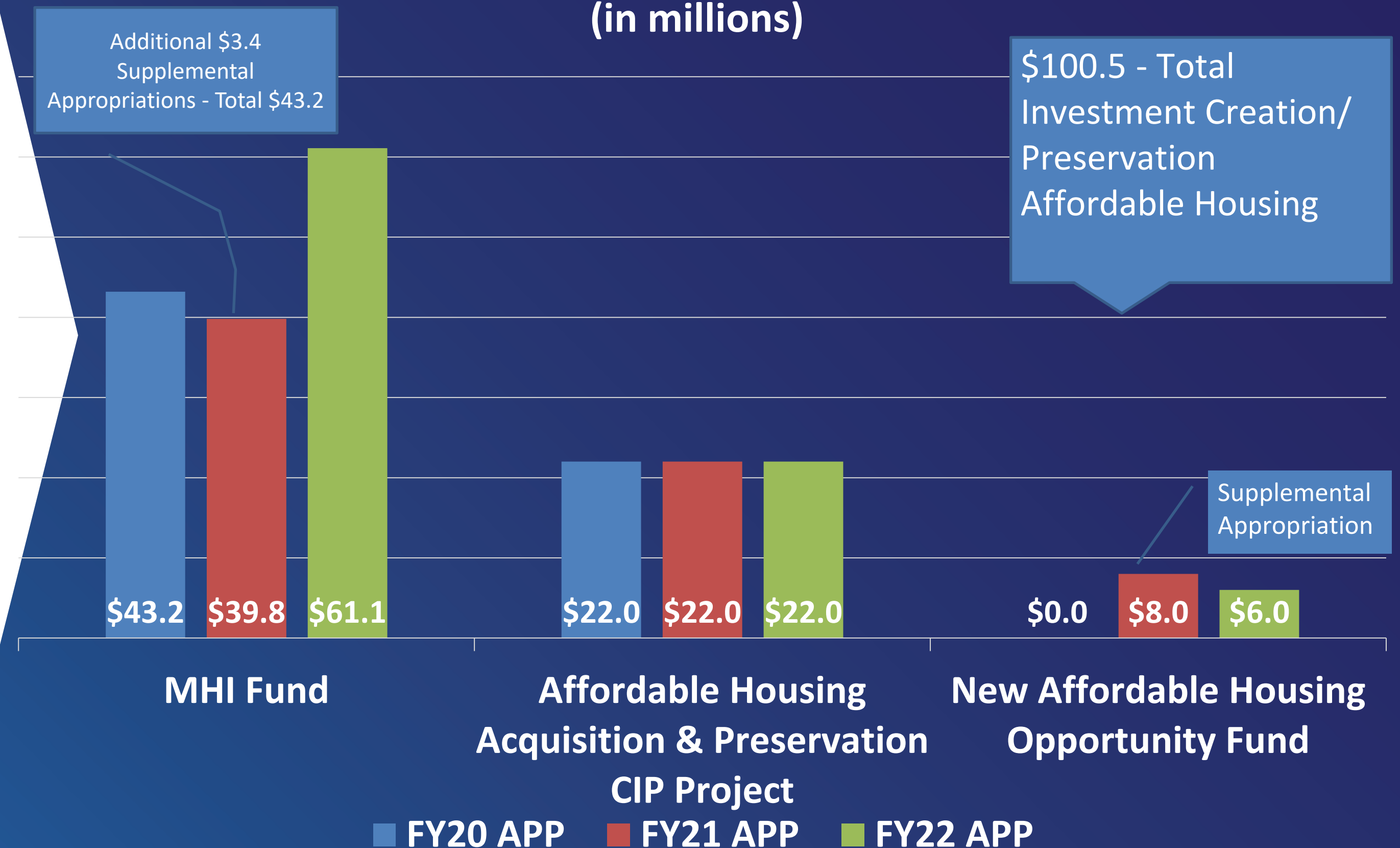
A More  
Equitable  
County



# A More Equitable County

## FY22 Approved Operating Budget & **Capital** Budgets

### Funding for Affordable Housing (in millions)





# Questions?

**Office of Management and Budget**

**<https://www.montgomerycountymd.gov/omb>**

**Office of Racial Equity and Social Justice**

**<https://www.montgomerycountymd.gov/ore>**