# Racial Equity and Social Justice (RESJ) Project Methodology Tool

## MISSION

The mission of the Office of Legislative Oversight (OLO) is to provide accurate information, analysis, and independent findings and recommendations that help the County Council fulfill its legislative oversight function. Legislative oversight includes the County Council's monitoring of publicly funded activities and their performance, and applying this knowledge to establish public policies, enact laws, approve budgets, and raise revenues.

OLO recognizes that fulfilling its mission requires applying a racial equity and social justice (RESJ) lens to our work aimed at ameliorating existing racial and social inequities in the County and shifting power to Black, Indigenous, and other People of Color (BIPOC) constituents. Applying a <u>RESJ lens</u> refers to the process of paying attention to race, ethnicity, and other social constructs when analyzing problems, looking for solutions, and defining success.[1] Montgomery County's RESJ Act also requires County departments to develop RESJ action plans.

OLO's Racial Equity Core Team developed an initial draft of this RESJ project tool to advance RESJ in OLO's project work. This tool is offered as a resource for applying a RESJ lens to OLO research projects when there is consensus among project sponsors and staff to do so. This tool has been finalized based on feedback from OLO colleagues and will be updated in the future based on promising practices.

## PURPOSE OF RESJ PROJECT TOOL

The purpose of this Racial Equity and Social Justice Project Methodology Tool is three-fold, to help OLO staff understand:

- What racial equity and social justice (RESJ) means,
- The importance of RESJ to OLO's mission to provide accurate information and analyses to the Council, and
- A process that our office can adopt to apply a RESJ lens to our research projects to ensure that they advance the Council's and the County's understanding of RESJ in government decision-making.

Of note, this tool prioritizes applying a racial equity lens to OLO's projects as a framework for addressing the impact of systemic racism on racial and ethnic inequities in County. An initial focus on racial equity ensures that OLO projects unpack and address racial equity impacts that are often the largest driver of social inequities. As OLO increases its capacity in applying a racial equity lens to research projects, the Core Team will provide comparable tools to enable the application of lenses for other social constructs to OLO projects.

## BACKGROUND

The County Council established the Racial Equity and Social Justice Act (Bill 27-19) to systemically apply an equity lens to government decision-making to advance racial equity and social justice.[2] The Act defines the following key terms:

- **Equity** means fair and just opportunities and outcomes for all people.

- **Race** refers to a social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (including color), ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the social, economic, and political needs of a society.

- ***Social justice*** means that everyone deserves to benefit from the same economic, political, and social rights and opportunities, free from health disparities, regardless of race, socioeconomic status, age, sex – including based on gender identity or orientation, religion, disability, or other characteristics.

- ***Racial equity and social justice*** refer to changes in policy, practice, and the allocation of County resources so that race or social justice constructs do not predict one's success, while also improving opportunities and outcomes for all people.

To advance the County's equity goals, the Act and its amendments[3] require OLO to analyze the potential impact of proposed legislation and zoning text amendments on racial and social inequities in the County and to identify strategies to reduce racial and social inequities for the Council's consideration. The RESJ Act also requires County departments and offices to develop action plans that advance RESJ.

Building on the work of OLO's RESJ impact statements to develop a process that applies a RESJ lens to OLO's research projects, OLO's Racial Equity Core Team has co-developed this RESJ project tool in partnership with Gamblin Consults. Like OLO's RESJ statements for bills and ZTA's, this tool reflects two key concepts:

- Racial equity and social justice refer to a **process** that focuses on centering the needs, leadership, and power of communities of color and communities with low incomes, with a **goal** of eliminating racial and social inequities.[4]

- Achieving racial equity and social justice usually requires seeing, thinking, and working differently to address the racial and social harms (inequities) that have caused racial and social disparities.[5]

## RESJ VISION AND MISSION

To help ground our efforts to advance RESJ decision-making as required by the RESJ Act, amendments, and Executive regulations, OLO has adopted the following RESJ vision and mission to guide our work:

**Vision.** OLO's work will help the County's leaders reverse current racial and social inequities. OLO's work will promote RESJ in all policy areas including housing, health, education, economic development, transportation, public safety, and land use. In addition, OLO will provide wholistic analyses that center RESJ in a systematic way, shed light about racial and social inequity wherever possible, and offer remedies to effectively address racial and social inequities.

**Mission**: OLO will educate and empower its own staff and government and community stakeholders to apply a racial equity lens to all our work and will evaluate our staff and our work products to hold ourselves accountable. As we build our capacity to apply a racial equity lens to our work, we will broaden our capacity to consider other social constructs (e.g., age, gender identity, linguistic diversity, disability, sexual orientation) in our analytical work.

## KEY RACIAL EQUITY PRINCIPLES

Applying a racial equity lens to OLO's **process** to writing and releasing reports, as well as the **outcome** of OLO's analysis and recommendations, will strengthen OLO's ability to provide information, analysis, and findings to the Council that enable them to provide effective oversight of County-funded agencies and address racial and social inequities. Toward this end, this tool encourages the application of three racial equity principles for each OLO research project:[6]

- **Principle 1: Center the needs, leadership, and power of BIPOC stakeholders.** The application of this principle includes viewing Black, Indigenous, and other People of Color (BIPOC) community members and staff in local agencies as leaders, respecting their experience; and using BIPOC scholars and institutions as sources of information whenever possible. This also requires racially equitable community engagement that does not reinforce unfair power dynamics where analysts exclusively engage BIPOC stakeholders to get what they want while ignoring them, their goals, and their needs (transactional rather than relational interactions).

- **Principle 2: Disaggregate data, analyze outcomes, understand the systemic drivers of racial inequities, and identify appropriate responses to racial inequities to achieve equal outcomes by race.** The application of this principle requires naming each community of color and acknowledging that each has its own history of racial inequities and disparities. This requires the collection and analysis of data disaggregated by race and ethnicity. This also requires for project analysis an understanding of the unique racial trauma that each community of color (Black, Indigenous, and People of Color) experiences and how those experiences contribute to current racial and social disparities in outcomes. Moreover, project recommendations aimed at narrowing racial disparities should be responsive to the specific racial inequities experienced by each BIPOC-community to advance equal outcomes by race and ethnicity.[7]

- **Principle 3: Engage BIPOC stakeholders in the completion, release, and follow-up of OLO reports.** The application of this principle requires creating systems of receiving and incorporating feedback from BIPOC stakeholders in communities, government, and other institutions. This includes incorporating BIPOC stakeholders into OLO report technical reviews and with report follow-up.

## INSTRUCTIONS

The process for completing an OLO project report consists of ten stages. The chart on the next page describes these stages along with which of the three racial equity principles is most applicable to apply in each stage.

These instructions are initially offered to pilot a process for applying a racial equity lens to select OLO projects. OLO analysts should initially consider the totality of this tool to implement the steps most germane to the projects selected for a RESJ pilot. As OLO pilots a RESJ lens for research projects, analysts are encouraged to begin by applying a subset of principles and prompts in this tool to a select set of projects. As analysts implement and become familiar with this tool, the OLO Core Team intends to update it to reflect best practices. Overtime, the Core Team anticipates that use of this tool in its entirety will become the norm and be applied to a significant share of OLO projects.

The remainder of this RESJ Project Tool features three main sections:

- Section 1: Project Description, Scope, Meetings, and Information Gathering;
- Section 2: Project Analysis, Writing, Findings, and Recommendations; and
- Section 3: Technical Reviews, Revision, Report Release, and Follow-up.

Each section offers a set of questions aimed at applying a racial equity lens to each OLO project stage. Before these three main sections, this tool also offers a set of pre-process prompts to help prepare for the three main sections of this RESJ Project Tool. The collective intent of all these prompts is to help OLO team members to investigate how well we are implementing the three racial equity principles. We encourage you to refer to the racial equity principles (the chart above) or other sections as needed as you use this tool.

# RESJ Project Methodology Tool
## Office of Legislative Oversight

| OLO Research Project Stages | Racial Equity Principles |
|---|---|
| 1. **Draft Project Description** | **Principle 1:** Center needs, leadership, and power of BIPOC stakeholders. |
| 2. **Finalize Scope** | |
| 3. **Stakeholder Meetings** | |
| 4. **Additional Information Gathering** | |
| 5. **Analysis and Writing** | **Principle 2:** Disaggregate data, analyze outcomes, understand the systemic drivers of racial inequities, and identify appropriate responses that achieve equal outcomes by race and ethnicity. |
| 6. **Draft Findings** | |
| 7. **Draft Recommendations** | |
| 8. **Technical Review with Key Stakeholders** | **Principle 3:** Engage BIPOC stakeholders in the completion and follow-up of OLO reports. |
| 9. **Revise and Finalize Report** | |
| 10. **Report Release and Follow Up** | |

## PRE-PROCESS PROMPTS

Before starting an OLO project, the OLO Core Team recommends considering the following prompts:

1. How am I being intentional about developing relationships with BIPOC-led community-based organizations, including using interpretation services to reach BIPOC communities speaking their native language(s)?

2. What is the racial and ethnic makeup of my contacts or database? What level of the organization or agency are they? If assessing a direct services program, how am I including BIPOC staff directly administering the programs as well as BIPOC community members with lived experience of the issue in this project?

3. How can I benefit from, add to, or start a database of BIPOC-data, scholars, information, and sources that can be referenced by OLO staff on an ongoing basis (e.g., listservs and newsletters, websites, data sources, etc.)? What are concrete ways that I can reference BIPOC scholarship throughout each stage of the report?

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## SECTION 1: PROJECT DESCRIPTION, SCOPE, MEETINGS, AND INFORMATION GATHERING

**Summary.** This section applies the first racial equity principle to the first four OLO project stages: (1) Project Description; (2) Scope; (3) Meetings; and (4) Information Gathering. Each of these stages have complementary goals that build upon one another, to create a strong foundation for the report. More specifically, the goal of:

- Stage 1 is to draft a project description to be approved by the Council;

- Stage 2 is to finalize the scope of the project after the Council has approved OLO's annual work program;

- Stage 3 is to hold meetings with County agencies and community organizations to gain a better understanding of the topic from different perspectives and identify additional resources relevant to the project; and

- Stage 4 is to gather additional information not already gathered in stakeholder meetings and document reviews to strengthen the analysis of the report.

**Rationale.** Historically, OLO analysts have not consistently considered BIPOC communities or needs in the development of OLO projects. While analysts may have considered the potential impacts of OLO projects on BIPOC residents and stakeholders, there was no explicit expectation to do so. To be more consistent in our approach, the OLO Core Team recommends the application of Racial Equity Principle 1 - *Centering the Needs, Leadership, and Power of BIPOC Stakeholders* - as the primary racial equity principle to implement during the initial stages of OLO projects.

Considering the racial equity implications of OLO projects requires understanding the racial equity context that shapes policies reviewed for OLO projects. Soliciting the perspectives of BIPOC stakeholders in the development and launch of OLO projects are critical first steps to improving analysts' understandings of the racial equity contexts of OLO projects.

**Key Questions for Launching OLO Projects**. To apply a racial equity lens to the development, scope, and launch of OLO projects, and to gather information, the OLO Core team recommends that OLO staff consider the following questions:

1. Where are the BIPOC residents who are directly impacted, and the BIPOC leaders supporting these impacted communities? Are they invited to provide feedback for these four stages? In what ways will BIPOC residents and organizations be acknowledged and honored for their time to meet with the OLO project team?

2. Is race, racial equity, and racial historical trauma (the systemic drivers of racial inequities) featured in the project description, scope, and/or meetings with stakeholders? If so, reflect on how the drivers of racial inequities within the project topic/scope can be expressed in a way that is integrated throughout these stages instead of mentioned in isolation.

3. During our meetings with BIPOC residents directly impacted and/or other BIPOC stakeholders, are we making race explicit? Are we coming to the table with an understanding of the racial historical trauma (the systemic drivers of racial inequities) relative to this topic and to unique BIPOC communities?

4. How are we respecting the leadership of BIPOC residents and BIPOC community-led efforts during the project developing and scoping, stakeholder meetings, and additional information gathering stages? Whose ideas are being respected and considered in subsequent project stages? Am I weighing the feedback from government staff more than BIPOC communities directly impacted?

5. What are BIPOC residents directly impacted, BIPOC-led organizations, and/or BIPOC government stakeholders sharing that they need to engage? This includes what environment they would like to meet to feel the most comfortable, what language they would like to speak in, if they would prefer to meet with others who speak their language or who are from the same racial or ethnic community, and how much time they need to prepare for meetings? How are we being responsive to what I am hearing?

6. How are we making space to meet with BIPOC frontline staff who are directly administering a policy or program and interface directly with BIPOC communities? Am I asking to meet with BIPOC frontline staff? How are we valuing the experiences they share relative to information often shared by White managers?

7. What are concrete ways that we can intentionally reference BIPOC scholarship and thought leadership in our project, during stakeholder meetings, and while gathering additional information? Are we talking with members of the OLO Core Team and/or Gamblin Consults about BIPOC-resources and scholarship and sharing information that we find with them?

## SECTION 2: PROJECT ANALYSIS, WRITINGS, FINDINGS, AND RECOMMENDATIONS

**Summary.** This section applies the second racial equity principle to the next three project stages: (5) Project Analysis and Writing; (6) Findings; and (7) Recommendations. Each stage has complementary goals that build on one another, to feature strong analysis, findings, and recommendations for the project report. More specifically, the goal of:

- Stage 5 is to analyze and write the information, history, and data gathered during Stages 1 through 4.

- Stage 6 is to highlight the main findings that were gathered, identified, and analyzed from Stages 1 through 5.

- Stage 7 is to provide recommendations that include reducing and eliminating the current racial inequities in this topic to promote social wellness among the residents of Montgomery County.

**Rationale.** Historically, OLO has not consistently considered data disaggregated by race and ethnicity as part of its analysis for projects. Nor has OLO consistently described how historic or current inequities by race and ethnicity have fostered disparities in outcomes by race and ethnicity or identified policy responses that achieve racial equity as part of its policy recommendations if warranted. This lack of analysis by race and ethnicity results in part from a lack of available data as many local agencies neither collect nor report input or outcome data by participant race and ethnicity. Yet, as the County Council's expectation for data analysis by race and ethnicity increases to track agencies' progress in narrowing racial and social disparities, so too should OLO's expectation that disaggregated data will be available for analysis and willingness to flag data gaps that prevent this desired analysis.

For the writing, analysis, findings, and recommendations development stages of OLO projects, the OLO Core Team recommends the application of Racial Equity Principle 2 as the primary racial equity principle to implement: *Disaggregate Data, Analyze Outcomes, Understand the Systemic Drivers of Racial Inequities, and Identify Appropriate Responses that Achieve Equal Outcomes by Race and Ethnicity.*

**Key Questions for Executing OLO Projects**. To apply a racial equity lens to the analysis, writing, and development of draft project findings and recommendations, the Core Team recommends that OLO staff consider the following prompts:

1. Are we looking at an overall data point or does it also provide data by race and ethnicity? What is the impact on each BIPOC community?

2. Based on what we learned in Stages 1-4 from BIPOC stakeholders, how is our analysis helping readers understand outcomes by race and ethnicity for each BIPOC group uniquely? How is our analysis communicating whether some data points are, or are not, undercounted?

3. In what ways does our analysis, findings, and recommendations of each BIPOC community thoughtfully feature their unique history of racism? How are we connecting this history with the current racial divides each BIPOC community experiences (e.g., disparities in outcomes by race and/or ethnicity)?

4. How is our analysis making the case for how the lack of data collection among departments by race and ethnicity reinforces disparities? How are our recommendations explicitly recommending disaggregated data collection?

5. How is our analysis also acknowledging that BIPOC communities directly impacted by this topic might also experience additional layers of inequity by class, immigration status, gender, etc.?

6. Is the data and analysis we are using reinforcing deficits on behalf of BIPOC individuals and communities (whereby we are upholding a narrative that blames BIPOC for systemic failures) or are the data points we are using reinforcing assets, whereby we are highlighting solutions from BIPOC communities and organizations that we can learn from, and the County can resource to scale up?

7. How does our analysis, findings, and recommendations make the case for why we need a combination of immediate and systemic changes, both of which focus on eliminating racial divides in this topic?

8. What are we prioritizing with our recommendations and why? Are we prioritizing recommendations that call out and address systemic racism, seek to address historical trauma (systemic drivers of racial inequities), and respond to the unique needs of each BIPOC community in a culturally sensitive way?

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## SECTION 3: TECHNICAL REVIEWS, REVISION, REPORT RELEASE, AND FOLLOW-UP

**Summary.** This section applies the third racial equity principle to the final OLO project stages: (8) Technical Reviews; (9) Revise and Finalize Report; and (10) Release and Follow Up. Each of these stages have complementary goals that build on one another to finalize the OLO project report. More specifically, the goal of:

- Stage 8 is to share the draft report with agency stakeholders for technical review. The OLO Core Team also recommends an opportunity for technical reviews by community members and BIPOC stakeholders.

- Stage 9 is to finalize the OLO report and include agency comments if warranted.

- Stage 10 is to release the final report, present it to the County Council during worksession, and follow up with agency and community stakeholders who engaged throughout the process to share the report.

**Rationale.** Historically, OLO analysts have not consistently considered BIPOC communities or stakeholders in the technical review of draft OLO projects. Whereas OLO has a process for seeking feedback and revisions on draft project reports from government stakeholders, a parallel process does not exist for soliciting and incorporating comments from BIPOC stakeholders who helped contribute to OLO's reports. The absence of BIPOC feedback in finalizing OLO projects creates missed opportunities to advance racial equity in public policy development and implementation. Conversely, OLO's engagement with BIPOC stakeholders in completing and sharing project findings and recommendations could help enhance the "rigor, relevance, and reach" of OLO reports.

For the final three stages of OLO projects, the Core Team recommends the application of Racial Equity Principle 3 as the primary principle to implement: *Engage BIPOC Stakeholders in the Completion, Release, and Follow-up of OLO reports.*

**Key Questions for Finalizing OLO Projects**. To apply a racial equity lens to the completion, release, and follow-up of OLO reports, the OLO Core team recommends that OLO staff consider the following eight questions:

1. What are the preferences of BIPOC communities to engage with a report (e.g., providing feedback by email, tracked changes, over the phone, in-person, in affinity groups by language or race)? How are we honoring this?

2. How much time have BIPOC residents, organizations, and government stakeholders expressed needing to review and provide technical feedback to our draft report? Have we ensured that they have this time?

3. When we review feedback from all stakeholders, are we asking ourselves how will this strengthen racial equity, the analysis of historical racial trauma, and the recommendations for eliminating racial divides? Are we asking ourselves whether this feedback might maintain or exacerbate current disparities by race or ethnicity instead? For example, if some stakeholders contend that individual factors (e.g., motivation) are more significant determinative of racial disparities than systemic factors, how do we address this in our findings?

4. How are we respecting the leadership of BIPOC residents and BIPOC community-led efforts during the technical review stage? Whose ideas are being respected and included in the final product submitted to Council? Are we weighing the feedback from government staff more than BIPOC communities directly impacted?

5. How did BIPOC experts (residents, organizational leaders, government stakeholders) express that they wish to be acknowledged in the report and followed up with once the report is released? How are we honoring this?

6. How did BIPOC stakeholders express that they would like OLO to share the findings and recommendations in the report with them (e.g., where, in what setting, what time, what format)? How are we honoring this?

7. How are we ensuring that each briefing is culturally relevant, explicit about the historical trauma of racial inequities of each BIPOC community, and highlighting BIPOC-specific stories of resilience, and best practices?

8. Are we making BIPOC stakeholders aware of Committee/Council worksessions regarding the report and/or other opportunities to engage Councilmembers about the report?

## CONTRIBUTORS

The first iteration of this tool was co-developed by Marlysa D. Gamblin of GamblinConsults and Elaine Bonner-Tompkins, OLO in partnership with OLO Core Team members Stephanie Bryant, Natalia Carrizosa, Kristen Latham, Janmarie Peña, Leslie Rubin, and Elsabett Tesfaye. If, a Foundation for Radical Possibility, co-sponsored the development of this tool.[8] This revised version of the RESJ Project Methodology Tool for OLO reflects the consensus of the office as a whole.

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[1] Adapted from definition of racial equity lens from Equity in the Center, Awake to Woke to Work: Building a Race Equity Culture, Appendix B, 2018 https://ncwwi-dms.org/index.php/resourcemenu/resource-library/inclusivity-racial-equity/advancing-racial-equity/1456-awake-to-woke-to-work-building-a-race-equity-culture/file

[2] Montgomery County Council, Bill No. 27-19 Racial Equity and Social Justice, https://www.montgomerycountymd.gov/COUNCIL/Resources/Files/RacialEquity/Bill27-19.pdf

[3] Montgomery County Council, Bill No. 44-20 Racial Equity and Social Justice, Amendments https://apps.montgomerycountymd.gov/ccllims/DownloadFilePage?FileName=2682_1_12149_Bill_44-20_Signed_20201211.pdf

[4] Definition of racial equity and social justice adopted from "Applying a Racial Equity Lens into Federal Nutrition Programs" by Marlysa Gamblin, et.al. Bread for the World, and from Racial Equity Tools https://www.racialequitytools.org/glossary

[5] Ibid

[6] Adapted from five racial equity principles from GamblinConsults. GamblinConsults is a Black-owned anti-racist consulting firm that helps institutions operationalize racial equity with the creation of tools, practices, and policies. https://www.gamblinconsults.com/

[7] For example, if African Americans account for 40 percent of COVID-19 deaths, they should receive at least 40 percent of all COVID-19 resources in order to achieve the same outcomes as everyone else (especially as with their White counterparts).

[8] If, a Foundation for Radical Possibility, is a local foundation that helps government jurisdictions in the District of Columbia, Maryland, and Virginia region build capacity to promote racial equity and social justice. https://www.iffdn.org