INTEGRATING EQUITY ANALYSIS & BUDGET PROCESS

Montgomery County Government
Rockville, Maryland

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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)

Legislation

- **Racial Equity Training** for County Leadership (January 2019)
- **Racial Equity Training - Debrief** for County Leadership (February 2019)
- **Office of Racial Equity** and Social Justice Established (December 2019)
- **Chief Equity Officer** appointment confirmed (February 2020)

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 definitions related to equity
Capital Budget – Geographic Analysis

FY22 Approved CIP Projects County Wide

FY22 Approved CIP Projects & Median Income

https://apps.montgomerycountymd.gov/BASISCAPITAL/Common/Index.aspx
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?
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)

- MHI Fund
- Affordable Housing Acquisition & Preservation CIP Project
- New Affordable Housing Opportunity Fund

FY20 APP FY21 APP FY22 APP

- MHI Fund: $43.2 $39.8 $61.1
- Affordable Housing Acquisition & Preservation CIP Project: $22.0 $22.0 $22.0
- New Affordable Housing Opportunity Fund: $0.0 $8.0 $6.0

Additional $3.4 Supplemental Appropriations - Total $43.2

$100.5 - Total Investment Creation/Preservation Affordable Housing

Supplemental Appropriation
Questions?

Office of Management and Budget
https://www.montgomerycountymd.gov/omb

Office of Racial Equity and Social Justice
https://www.montgomerycountymd.gov/ore