

# FY24 Operating Budget Equity Tool Guidance Manual

THE OFFICE OF RACIAL EQUITY AND SOCIAL JUSTICE

MONTGOMERY COUNTY GOVERNMENT

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## Introduction

In accordance with [Bill #44-20](#), The Office of Racial Equity and Social Justice (ORESJ) develops racial equity tools and processes to help county employees apply a racial equity lens to budget decisions. The FY24 Operating Budget Equity Tool (OBET) is designed to help departments and decisionmakers consider the racial equity and social justice impacts of their budget decisions.

This guide provides departments with information about the FY24 OBET and process. The subsequent sections will explain:

- what the OBET is
- how it advances the County’s goal of reducing and eliminating racial disparities and inequities
- how it should be completed and by whom
- how responses to the tool will be assessed and used in decision-making processes

## What is the FY24 Operating Budget Equity Tool (OBET) and why is it important?

The OBET is both a product and a process that encourages departments and decisionmakers to consider the impacts of their department-level resources, proposed program<sup>1</sup>

### Why lead with Race?

The Government Alliance for Race and Equity (GARE)—of which Montgomery County is a member—calls its more than 400 member jurisdictions to center race in their pursuit of equity and justice for all. We, along with others, lead with race for several reasons:

- The creation and perpetuation of advantage and disadvantage based on race (and other racialized identities) is baked into the history and structures of US government policies, practices, and procedures.
- Racial inequities exist across all dimensions of success and well-being; these inequities are deep and pervasive and are compounded by other forms of oppression including based on gender identity, sexual orientation, ability, nativity, and age, to name a few.
- Focusing on racial equity is an opportunity to introduce a framework, tools and resources that can also be applied to other areas marginalization. Therefore, leading with race is a strategy to help achieve equity and justice for all, not an attempt to rank oppressions based on severity.

(service/initiative) enhancements, reductions, and overall budget decisions on racial disparities

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<sup>1</sup> Throughout the Guidance Manual and OBET, we refer to “program” which encompasses programs, services, activities, and initiatives.

and inequities in the County. This tool makes applying a racial equity lens concrete by providing a structured approach for identifying, analyzing, and interpreting data about historical and current racial disparities and inequities in the County. This structured approach brings conscious attention to the systemic inequities that produce racial disparities, barriers to access, and inequitable outcomes for communities that identify as Black, Indigenous, People of Color (BIPOC) and low-income communities. With this information, departments can adjust their planning, design, or evaluation of their budgets – with the intention of leading to outcomes that more closely align with the County’s goals – while also supporting decisionmakers in assessing budgets based on their ability to advance priority initiatives such as racial equity and social justice.

### How will responses to the OBET be used?

Responses to the OBET will be analyzed by ORESJ using two separate rating rubrics—one to assess department-level responses and the other to assess program-level responses. The rating rubrics will help ORESJ identify department and program-level budgets with the greatest potential of supporting the County’s goal of reducing and eliminating racial disparities and inequities in the County. ORESJ will provide a summary of budget scores to departments and decisionmakers, along with recommendations related to which budgets (based on available information) are likely to advance equitable access or outcomes for communities identifying as BIPOC and low-income. In addition, ORESJ will identify budgets that demand additional attention to mitigate unintended consequences disproportionately burdening BIPOC and low-income communities.

#### Department-level analysis

ORESJ will use the Department-level analysis to identify areas of strength and opportunity in the department’s ability to carry out its commitments to racial equity and social justice.

#### Program-level analysis

ORESJ will identify program enhancements and new programs that target resources towards reducing racial disparities and inequities. ORESJ will also identify program reductions that demand additional attention towards mitigating unintended consequences.

More information about the rating rubric and ORESJ’s analysis can be found in the OBET Scoring Rubric section of the guide.

### The FY24 OBET

Below is the list of questions and prompts that make up the FY24 OBET. Similar to last year, respondents will be asked a series of both Departmental- and Program-level questions regarding their proposed

**Tip: Read through the entirety of the FY24 OBET prior to formulating your response.**

FY24 budget. Each response should be approximately 4-5 sentences of narrative and include details that address the listed prompts.

**Tip: To complete the FY24 OBET, engage relevant staff (CORE Team members and Leads) early and often.**

New this year, all departments will be required to answer the department-level questions. Each department will then be asked to respond to the OBET program-level questions regarding a proposed program enhancement, new program, or program reduction for

a minimum of one (maximum of three) programs. Departments are not required to use the OBET for all program-level budgets.

**Please keep in mind that your responses to these questions are the primary source of information for ORESJ's assessment and that the result of the assessment is a rating that will be used by various decisionmakers in the budget deliberation process.**

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## Tool Questions

### Department-level question

1. How will your overall budget support the department's commitment to advancing racial equity and social justice? To aid you in the formulation of your response, we've offered a list of activities, using the GARE framework, that demonstrate department-level commitments to racial equity and social justice. More information about the GARE framework is below and [here](#).

**Instructions: First**, indicate which activities under the GARE framework this budget enables your department to commit to and undertake. **Then**, in the text boxes that follow, please describe how your budget targets resources towards these activities.

*The Government Alliance on Race and Equity ([GARE](#)) recommends the normalize, organize, operationalize theory of change to guide jurisdictions in planning for and making changes that reduce and eliminate racial disparities, inequities, and improve outcomes for all. Please indicate which activities your proposed budget will enable you to undertake?*

- *Normalize--Establish racial equity as a key value by developing a shared understanding of key concepts across the department and create a sense of urgency to make changes*
  - Form a Racial Equity CORE Team
  - Allocate or support the use of staff time for CORE team activities
  - Develop a racial equity vision statement (and/or racial equity and social justice mission, values, or guiding principles)
  - We're doing something else and will use the text box to describe.
  - We've not made commitments in this area and will use the text box to explain.

Please use the text box to a) tell us any additional activities your department’s budget will enable that were not identified above, b) tell us how your department’s budget will target resources towards the activities you’ve identified, and c) if you answered, “we’ve not made commitments in this area”, please tell us why and any barriers you’re facing.

TEXT BOX

- *Organize—Build staff and organizational capacity, skills, and competencies through training while also building infrastructure to support the work, like internal organizational change teams and external partnerships with other institutions and community*
  - Implement a plan or policy requiring all staff and leadership to complete “Advancing Racial Equity: the Role of Government” and “the Racial Equity Institute’s Groundwater Approach: building practical understanding of structural racism” trainings
  - Designate permanent and sustainable staff resources, with an FTE or similar investment, to organize and lead the department’s commitment to racial equity and social justice
  - Designate resources for staff participation in GARE conferences and other department-specific racial equity and social justice professional development
  - Develop a strategy to engage communities in planning, design, or other decision-making processes
  - We’re doing something else and will use the text box to describe.
  - We’ve not made commitments in this area and will use the text box to explain.

Please use the text box to a) tell us any additional activities your department’s budget will enable that were not identified above, b) tell us how your department’s budget will target resources towards the activities you’ve identified, and c) if you answered, “we’ve not made commitments in this area”, please tell us why and any barriers you’re facing.

TEXT BOX

- *Operationalize—Put theory into action by implementing new tools for decision-making, measurement, and accountability like a Racial Equity Tool and developing a Racial Equity Action Plan.*
  - Field a staff survey and or conduct focus groups to identify areas of strength and opportunity in recruiting, retaining, and advancement of a diverse and representative workforce
  - Conduct an organizational assessment to identify areas of strength and opportunity for advancing racial equity in policies, programs, and practices

- Track program access and service outcomes by race, ethnicity, and other relevant demographic or socioeconomic characteristics
- Using or creating department-specific racial equity tools or maps to support analysis (of policy, program, practice, procedure) or resource decisions
- We’re doing something else and will use the text box to describe.
- We’ve not made commitments in this area and will use the text box to explain.

Please use the text box to a) tell us any additional activities your department’s budget will enable that were not identified above, b) tell us how your department’s budget will target resources towards the activities you’ve identified, and c) if you answered, “we’ve not made commitments in this area”, please tell us why and any barriers you’re facing.

TEXT BOX

2. How does your department’s budget allocate funds towards ensuring that public documents (including websites and related apps), policies, plans, meetings, and hearings are readily accessible to the public? Please use the checkboxes below to indicate which activities your department budget will enable. **Then**, in the text box that follows, please describe how your budget targets resources towards these activities.

- a. Translating documents and marketing material to relevant languages based on the project impact area. Completed in partnership or at the advisement of the Office of Community Partnerships.
- b. Ensuring interpretation services (ASL and closed-captioning) are available to the public in all relevant places and programs (such as service desks, service phone lines, open houses, public meetings, etc.)
- c. Ensuring accessibility for people with disabilities using [Section 508 of the Rehabilitation Act](#); [Web Content Accessibility Guidelines](#); and compliance with the [Americans with Disabilities Act](#) as a minimum standard.
- d. We’re doing something else and will use the text box to describe.
- e. We’ve not yet planned or implemented strategies listed here and will use the textbox to explain why.

Please use the text box to a) tell us how your department’s budget will target resources towards the activities you’ve identified, b) tell us any additional activities your department’s budget will enable that were not identified above, and c) if you answered, “we’ve not yet planned or implemented strategies”, please tell us why and any barriers you’re facing.

TEXT BOX

3. Advancing racial equity and social justice in any organization requires supportive systems and structures. We would like to understand how the County’s systems and structures affect your ability to implement the GARE Framework (normalizing, organizing, and operationalizing).

What persistent gaps or limitations could inhibit your department’s ability to advance racial equity and social justice? (Potential challenge areas include but are not limited to: staffing shortages (vacancies, retention issues, retirements, etc.); leadership gaps (absence of departmental or agency leadership staff); siloed workflows (organizational structures that inhibit collaboration and communication); bureaucratic burdens (delays, inefficiencies, challenges stemming from other areas of local government); State/Federal regulations/laws).

By describing persistent gaps or limitations, ORESJ can raise awareness of structural or systemic issues impeding the advancement of racial equity and social justice in the County. Please use the text box to describe any gaps or limitations impeding your ability to implement the GARE framework (normalizing, organizing, operationalizing).

TEXT BOX

### Program-level questions

Please answer the following questions about your new program/program enhancement

1. What is the purpose of this program (this may also be a service, initiative, or activity)? *In your response, please list the outputs and outcomes the program seeks.*
2. Describe the ways your department used (quantitative and qualitative) data, community engagement, research on racial disparities and inequities (in the US and the County) and best practices for advancing racial equity **to design/enhance the program**. If this enhancement/new program is offset by reductions elsewhere in this program budget, please describe those reductions and steps you’re taking to mitigate against creating or worsening racial disparities or inequities that may result from the reduction.  
*Please tell us about any missing data or existing policies/practices that may limit your ability to consider racial equity and social justice in program design.*
3. How will this program specifically reach the people most negatively impacted by the challenges this program addresses?
4. How will you track and measure program and service outcomes?

**Reminder: You are not required to answer the program-level questions for ALL programs your department administers.**

**Each department is required to answer the program-level questions for a minimum of one, and maximum of three, programs.**

**Programs receiving an OBET response should be a new program, program enhancement, or a program reduction.**



Please answer the following questions about program reductions

1. What is the purpose of this program (this may also be a service, initiative or activity)? *In your response, please list the outputs and outcomes the program seeks.*
2. How could reductions to this program budget affect people most negatively impacted by the challenges this program addresses?
3. What steps have you taken to mitigate against the creation or worsening of racial disparities or inequities that may result from **the proposed program reduction?**
4. How will you track and measure program and service outcomes?

### General OBET questions

Please answer the following questions regarding overall completion of the FY24 OBET

1. Who and what resources did you consult in the preparation of this Budget Equity Tool response? *Please use the prompts below to describe your research and process of completing this tool.*
    - a. Have you consulted with your Racial Equity CORE Team or CORE Team Lead? (If yes, please provide their name (s))
    - b. Have you consulted with the Montgomery County Office of Racial Equity and Social Justice? (Names of ORESJ staff that you consulted with and dates, and/or resources shared by ORESJ.)
    - c. Have you reviewed any Racial Equity Impact Assessments (or other related equity analyses) related?
  2. Please provide the name(s) of those involved in the completion of this assessment. *Please use the prompts below to describe your research and process of completing this tool.*
    - a. Assessment completed by: (Name(s), Title(s), Department)
    - b. If different from above, Departmental Director: (Name)
  3. Please upload any documents that will aid in the explanation of how proposed budget aligns with the County's policy of reducing and eliminating racial disparities and inequities.
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### Who should complete the OBET?

Completion of the OBET will likely require input from multiple stakeholders as it's important to bring different perspectives to budget development, as well as the underlying analysis of problems the budget seeks to address—analysis of data, assessment of regulatory or funding context, and feedback from residents. Budget stakeholders include, but are not limited to, department Racial Equity CORE Team members and Team Leads, staff or nonprofit partners working directly with residents, and residents (particularly prospective clients or beneficiaries). The final tab of the OBET will ask you to list the names of stakeholders who contributed to department's response.

## What data sources should be used?

To support the use of a racial equity lens, we have provided the below list of data sources as a starting point. We also expect that each department will have relevant administrative and program data that it regularly analyzes and consults in its decision-making processes. When looking at this data, some questions and practices<sup>2</sup> to consider when applying a racial equity lens are:

- Disaggregating data, which gives insights into the particular experience and circumstances of specific population groups (by race, ethnicity, nativity, gender, disability, etc.). Disaggregating data can help in identifying and unpacking dimensions of a specific inequity or inequitable outcome. When data is not disaggregated and viewed in its aggregate form, it can mask inequities.
- Use qualitative data (interviews, focus groups, narrative, longform surveys) to provide needed context to quantitative analysis
- What is the role of historical or current policies in the outcome you're observing?
- Once you've analyzed your data, who is looking at and making sense of it? It's important to bring multiple perspectives to the interpretation of your analysis.

The sources listed below can give you insights into the circumstances and experiences of communities identifying as BIPOC and low-income in the County (and nationally).

Disaggregating data (as the sources below do) is critical in understanding and redressing racial inequities. As practitioners from the USC Center for Urban Education explain, “disaggregated data can spark critical awareness of racialized outcomes and patterns, catalyze deep reflection about taken-for-granted assumptions, and establish racial equity as an ongoing process of organizational learning and change.”<sup>3</sup>

**Montgomery County Racial Equity Profile:** This profile, a publication of the Office of Legislative Oversight, prepared by Jupiter Independent Research Group, summarizes data points across several indicators of well-being to offer a snapshot of racial inequities and disparities across the community:

[https://www.montgomerycountymd.gov/OLO/Resources/Files/2019%20Reports/OLO2019-7-6\\_20\\_19.pdf](https://www.montgomerycountymd.gov/OLO/Resources/Files/2019%20Reports/OLO2019-7-6_20_19.pdf)

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<sup>2</sup> This list of practices is adapted from research done by Actionable Intelligence for Social Policy, University of Pennsylvania. Suggested Citation: Hawn Nelson, A., Jenkins, D., Zanti, S., Katz, M., Berkowitz, E., et al. (2020). A Toolkit for Centering Racial Equity Throughout Data Integration. Actionable Intelligence for Social Policy, University of Pennsylvania. Available at [https://www.aisp.upenn.edu/wp-content/uploads/2020/08/AISP-Toolkit\\_5.27.20.pdf](https://www.aisp.upenn.edu/wp-content/uploads/2020/08/AISP-Toolkit_5.27.20.pdf)

<sup>3</sup> Center for Urban Education. (2020). Equity-minded inquiry series: Data Tools. Rossier School of Education, University of Southern California. Pg. 5. Available at:

**NATIONAL EQUITY ATLAS:** Developed by PolicyLink and PERE, the National Equity Atlas includes national, state, regional, and county-level data disaggregated by race and income. Examples of available equity indicators include homeownership, wages, unemployment, disconnected youth, school poverty, air pollution, education levels and job requirements, housing burden, car access, neighborhood poverty, asthma, diabetes, etc.: <http://nationalequityatlas.org/indicators>

**STATISTICAL ATLAS:** A comprehensive atlas produced by the Census Bureau, and a source for disparity data:

<https://statisticalatlas.com/county/Maryland/Montgomery-County/Overview>

The Power of Qualitative Data  
To contextualize data, and derive meaningful insights for equity analyses, it is important to seek out sources of qualitative data to answer questions like: Why does this disparity exist? What policies or practices create barriers or inequitable access? Sources of qualitative data include, but are not limited to, feedback from community engagement surveys, focus groups, or meetings and related public policy research.

**The Office of Racial Equity and Social Justice Racial Equity Impact Assessments (REIAS) of Special/Supplemental Appropriations:** ORESJ has conducted more than 70 REIAs on a range of topics that offer analysis and context about racial disparities and inequities in the County and the kinds of programs, practices, or activities that respond to and/or shift structures creating these inequities. <https://www.montgomerycountymd.gov/ore/appr.html>

**Health in Montgomery in Montgomery County 2010-2019 A Surveillance Report on Population Health:** This report provides data points disaggregated by race, ethnicity, gender, and age for eight health related topics: demographics, social determinants of health, and healthcare access; vital statistics; maternal and infant health; chronic diseases; infectious diseases; behavioral health; injuries; and environmental health: <https://www.montgomerycountymd.gov/HHS/Resources/Files/Health%20in%20Montgomery%20County%202010-19.pdf>

**The Annie E. Casey Foundation Kids Count Data Center:** KIDS COUNT® is a project of the Annie E. Casey Foundation and a premier source of data on children and families. Each year, the Foundation produces a comprehensive report — the [KIDS COUNT Data Book](https://datacenter.kidscount.org/) — that assesses child well-being in the United States: <https://datacenter.kidscount.org/>

## Sample responses to the FY24 OBET

### Sample Department-Level Response

The following is a sample department-level response. The sample is based on a fictitious department but based on ORESJ's knowledge of departments' current commitments and capacities; we believe these responses may be aspirational for some but are nonetheless realistic. The format of the response will

look different in BASIS, but for the purposes of this manual, we have abbreviated the questions and used a table to display the sample content:

### SAMPLE RESPONSE QUESTION 1

....First, indicate which activities under the GARE framework this budget enables your department to commit to and undertake. Then, in the text box that follows, please describe how the overall budget targets resources towards these activities....

GARE Framework	Normalize	Organize	Operationalize
Commitment	<ul style="list-style-type: none"> <li>✓ <b>Allocate or support the use of staff time for CORE Team activities</b></li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>Implement a plan or policy requiring all staff and leadership to complete “Advancing Racial Equity: the Role of Government” and “the Racial Equity Institute’s Groundwater Approach: building practical understanding of structural racism” trainings</b></li> <li>✓ <b>Designate resources for staff participation in GARE conferences and other department-specific racial equity and social justice professional development</b></li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>Using or creating department-specific racial equity tools or maps to support analysis (of policy, program, practice, procedure) or resource decisions</b></li> </ul>
Text box explanation	<p><b>We’ve allocated 15% of the CORE Team Leads time to work with CORE team members to develop a Racial Equity Action Plan and advise department leadership on racial equity issues in our policy area</b></p>	<p><b>To build the capacity of our department to use a racial equity lens, we’ve developed a policy requiring all staff to complete both of the trainings ORESJ offers by the end of FY24. We’ve also allocated funding for the participation of the CORE team in the annual GARE conference.</b></p>	<p><b>To help us bring a racial equity analysis into our planning and evaluation division, we’ve allocated resources for a consultant team of graduate students to develop an equity index and utilization guide. This tool will help our department consider racial equity in future service or program offerings.</b></p>

### SAMPLE RESPONSE QUESTION 2

....Please use the checkboxes below to indicate which activities your department budget will enable

- ✓ **Translating documents and marketing material to relevant languages based on the project impact area. Completed in partnership or at the advisement of the Office of Community Partnerships.**

- ✓ Ensuring accessibility for people with disabilities using [Section 508 of the Rehabilitation Act](#); [Web Content Accessibility Guidelines](#); and compliance with the [Americans with Disabilities Act](#) as a minimum standard

Please use the text box to a) tell us how your department’s budget will target resources towards the activities you’ve identified.....

**The Department strategy for FY24 involves an increased push for multimedia content regarding a suite of new programs. To ensure the content, platform, and communication strategy is accessible, we’ve allocated resources for a consultant to conduct a digital accessibility audit using the Web Content Accessibility Guidelines. We’ve also allocated resources for our CORE team lead and three program managers to learn from and adapt skills used in the digital accessibility audit to help bring the expertise in house. We also plan on convening a series of participant focus groups—targeted towards participants with disabilities and speakers of other languages—to gather feedback about the accuracy of the multilingual translation and the strength of the audio descriptions used in the multimedia content.**

### SAMPLE RESPONSE QUESTION 3

... Please use the text box to describe any gaps or limitations impeding your ability to implement the GARE framework (normalizing, organizing, operationalizing).

**The Department is currently experiencing challenges hiring and retaining a diverse and representative workforce. We know that having a diverse staff at all levels of the department, including in senior leadership, will strengthen our ability to plan, deliver, and evaluate programs with a racial equity lens. Unfortunately, challenges across government have caused delays in recruitment and hiring. We’ve also had retention issues among our mid-level managers which is currently comprised of 65% people of color and women staff. We think this challenge stems from low morale and a lack of career pathways within our department and across government. Exit interviews have revealed that mid-level managers are seeking employment with agencies that have more well-defined career pathways and advancement opportunities. Additionally, staff have reported that complex siloes and hierarchies outside of our department cause inefficiencies and stymie innovation. If there were ways to strengthen cross-department workflows and build career ladders, we think our mid-level managers would be more inclined to stay. Retaining this segment of our workforce is particularly important for our ability to apply a racial equity lens to our work.**

### Sample Program-Level Response

The following is a sample program-level response. The sample is based on an adaptation of a current program – Montgomery Connects - Computer for You – which is managed and operated by the Department of Technology & Enterprise Business Solutions (TEBS), Office of Broadband Programs (OBP). Responses have been modified to fit the purposes of this example as a program enhancement but are nonetheless realistic.

1. What is the purpose of this program (this may also be a service, initiative, or activity)? *In your response, please list the outputs and outcomes the program seeks.*

The purpose of the Montgomery Connects – Computer For You program is to continue providing low-income residents without access to a computer with a Chromebook—specifically school-aged children who identify as BIPOC and those whose primary language is not English. Montgomery County, in partnership with Montgomery County Public Libraries, received a federal Emergency Connectivity Fund to purchase 40,000 computers. The Emergency Connectivity Fund is a federal grant issued in response to Covid, which built upon the federal E-rate program—providing funding to schools and libraries for internet, equipment, and computers, by providing funding for students and library patrons to receive computers for use at home (school and library WiFi and computers could not be accessed during Covid-closures). The goal of this COVID-19 relief is to help close the Homework Gap for students who currently lack access to internet or the devices they need to connect to the classroom<sup>4</sup>.

The goal of the County is to promote the program and prioritize distribution to low-income residents who are receiving Covid assistance or food assistance, enrolled in benefit programs, live in low-income areas, or live in areas where there are disproportionately higher numbers of Black and Latino households without home computers or home broadband. The grant funds up to \$400 per computer and specifically prohibits the County from using grant funds to purchase software, cases, and other peripherals.

2. Describe the ways your department used (quantitative and qualitative) data, community engagement, research on racial disparities and inequities (in the US and the County) and best practices for advancing racial equity **to design/enhance the program**. If this enhancement/new program is offset by reductions elsewhere in this program budget, please describe those reductions and steps you're taking to mitigate against creating or worsening racial disparities or inequities that may result from the reduction.

*Please tell us about any missing data or existing policies/practices that may limit your ability to consider racial equity and social justice in program design.*

By examining current data and research on the Homework Gap and the digital divide, our department designed the program to address the needs of those experiencing the greatest barriers—low-income children and families as well as Black and Latino children and families. The Homework Gap describes an aspect of the digital divide specifically related to a households' lack of home internet or hardware necessary to support online learning. Prior to the pandemic, data suggests that as many as 17 million children under the age of 18 in the US<sup>5</sup> were affected by this issue—disproportionately impacting low-income households and households of color; specifically those identifying as Black, Latino, and American Indian/Alaska Native<sup>6</sup>. The data reveals larger percentages of Black, Latino, and American Indian/Alaska Native households – compared to White and Asian households – do not have access to high-speed internet or a computer at home. The data also shows that nationwide

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<sup>4</sup> Federal Communications Commission.

<sup>5</sup> All4Ed. Homework Gap. July 21, 2020. Available at: <https://all4ed.org/publication/homeworkgap/>

<sup>6</sup> All4Ed. See data analysis section.

**23% of households do not have access to high-speed internet at home, while 10% of households do not have access to a computer at home. Those percentages almost double for households making less than \$25,000 a year.**

**The County collects demographic data to understand which communities are receiving computers, where there is need, and to have race, age, and income statistics to apply for future grants. Pilot results<sup>7</sup> highlight a program with the potential to shrink the Homework gap and reduce the digital divide in the County.**

- **55% of recipients earn less than \$25,000 per year and 35% earn between \$25,001 and \$50,000 per year.**
- **54% of recipients are Black or African American, and 31% are of Hispanic, Latino, or Spanish origin.**
- **85% of recipients responding to our survey stated they have a smartphone, but only 11% had a computer and most existing computers were more than 9 years old.**
- **A combined 56% of recipients and events were in Upcounty (37%) and Eastern Montgomery<sup>8</sup> (19%)**

**The program was also reviewed by ORESJ in the development of a Racial Equity Impact Assessment (REIA) for Supplemental Appropriation #22-94**

3. **How will this program specifically reach the people most negatively impacted by the challenges this program addresses?**

**To reach populations most negatively impacted by the Homework Gap, we are using GIS to identify schools with large percentages of FARMS-eligible students; we are then convening principals, parents, teachers and student councils of those schools to determine what their greatest needs are with regard to digital connectivity. We will also conduct targeted outreach and strategic communications working with trusted partners, co-locating enrollment for services (including broadband) and expanding language access.**

4. **How will you track and measure program and service outcomes?**

**The program hopes to track and measure its service outcomes – particularly for low-income children of color – through ongoing engagement efforts to include surveys, focus groups and other means of follow-up.**

## How will the OBET responses be scored?

ORESJ developed two rating rubrics that helps assess departments' commitments to advancing racial equity and social justice and the extent to which programs (new, enhancements, and

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<sup>7</sup> Montgomery County Government. *Montgomery Connects – Computer For You*. 2021. Available at: <https://www.montgomerycountymd.gov/obp/computer-for-you.html>

<sup>8</sup> Montgomery County Government. *Regional Service Centers*. 2022. Available at: <https://www.montgomerycountymd.gov/Government/rsc.html>

reductions) are aligned with the County’s policy of reducing and eliminating racial disparities and inequities.


The department-level rating is based on the strength of the department’s commitment to advancing racial equity and social justice, as described in the GARE framework (normalizing, organizing, operationalizing for racial equity). The strongest commitment (receiving three stars) is demonstrated by a budget that targets resources towards activities across all three areas of the GARE framework. Ratings will consider departments’ narrative explanations as well and any additional actions they are taking towards building an infrastructure for racial equity.

For program-level budgets, the ratings take into consideration the identification of specific racial disparities and inequities in the County; the use of data, supplemental research, and community engagement in the analysis of those disparities and the formulation of the budget; and the strength of the connection between the budget and its ability to advance racial equity and social justice in the County. If a program demonstrates a strong likelihood to reduce and eliminate racial disparities and other inequities in the County, the response will receive four stars. Like department-level ratings, program-level ratings will also consider narrative explanations as well and any additional actions towards advancing equitable outcomes.




ORESJ will provide a rating as well as a short justification in narrative form of the Department-level responses in addition to ratings and summative justification of the Program-level responses. Ratings and justification narratives will be provided to departments, the Office of Management and Budget, and the County Executive in January 2023 (in alignment with OMB’s Operating Budget deliberation process). Ratings will not change once they are transmitted. Ratings will help decisionmakers understand which budgets have the greatest potential of advancing racial equity and social justice in the County and which budgets may require additional attention to address unintended consequences. OBET ratings will be used as one of several criteria informing the County Executive’s recommended FY24 Operating Budget. For departments whose ratings are low, it is our hope that you utilize feedback provided by ORESJ to strengthen your final budget submissions.

## OBET Rating Rubric


### Department-level Rubric

Rating Scale	Rating Explanation
 <p><i>Department-level budget demonstrates a <b>strong commitment to advancing racial equity</b></i></p>	<p>The department-level budget will enable the department to commit to and take action in all three areas of the GARE Framework.</p>



<i>and social justice in Montgomery County</i>	
 Department-level budget demonstrates a <b>commitment</b> to advancing racial equity and social justice in Montgomery County	The department-level budget will enable the department to commit to, and take action in, two of three areas of the GARE Framework.
 <i>Department-level budget demonstrates an <b>emerging commitment</b> to advancing racial equity and social justice in Montgomery County</i>	The department-level budget will enable the department to commit to, and take action in, one of three areas of the GARE Framework.
 <i>The Department-level budget <b>does not yet demonstrate</b> a commitment to advancing racial equity and social justice in Montgomery County</i>	The department-level budget does not currently indicate any commitments or actions aligned with the GARE framework.

Program-level Rubric

Rating Scale	Rating Explanation
 <b>Strong Likelihood</b> to reduce and eliminate racial disparities and other inequities in Montgomery County	There is a strong likelihood that the program will reduce and/or eliminate racial disparities and other inequities in the County as the response demonstrates—with the use of data, community engagement, and research—a clear correlation between racial inequities and the program’s need. This program is therefore likely to advance equitable

	outcomes for those identifying as BIPOC and/or low-income.
<p>★★★★☆</p> <p><b>Likely</b> to reduce and eliminate racial disparities and other inequities in Montgomery County</p>	The program is likely to reduce and eliminate racial disparities and other inequities in the County in that the response demonstrates a link between racial inequities and the program’s need. However, the analysis—use of data, community engagement, and research—could be strengthened to make the link between racial inequities and the program’s need clearer.
<p>★★★☆☆</p> <p><b>Potential</b> to reduce and eliminate racial disparities and other inequities in Montgomery County</p>	The program maintains current levels of operation and outcomes. While there is a potential to reduce and eliminate racial disparities and other inequities in the County there is insufficient evidence linking the program to more equitable outcomes.
<p>★★☆☆☆</p> <p><b>Unlikely</b> to reduce and eliminate racial disparities and other inequities in Montgomery County</p>	The program is unlikely to reduce and eliminate racial disparities and other inequities in the County as the response does not demonstrate a link between racial disparities and how the program will address them.
<p>☆☆☆☆</p> <p><b>Does Not</b> reduce and eliminate racial disparities and other inequities in Montgomery County</p>	The program does not reduce and eliminate racial disparities and other inequities as the response did not identify any racial disparities or inequities or attempt to link them to the project in a way that justified its need. Simply, the project does not demonstrate the ability to advance equitable outcomes for residents as it was not considered in the response. More so, the project has the potential to cause undue burden or harm on low-income communities or those who identify as BIPOC.

**Narrative Justification**


Along with the rating scale, ORESJ will provide a brief justification in narrative form based on the following considerations:

1. The level of detail and clarity about how budgets target resources towards various activities and/or programs that demonstrate commitment to and action towards advancing racial equity and social justice
2. The use of data, community engagement, research on racial disparities and inequities, and best practices for advancing racial equity to make decisions about how resources should be targeted and/or how programs should be designed to advance racial equity and social justice
3. The resources-- CORE Team leads, ORESJ, or outside experts—that were consulted during budget development.


## Sample OBET rating and justification

The following are sample ratings based on the OBET responses used in this manual.

### Sample Department-level rating (based on sample department-level response)

Score	Narrative justification
 Department-level budget demonstrates a <b>strong commitment</b> to advancing racial equity and social justice in Montgomery County	The department demonstrates a strong commitment to racial equity and social justice as it has allocated resources in its FY24 budget that are targeted specifically towards ensuring staff have the capacity and time to develop strategies and plans that center racial equity and social justice. The addition of a consultant team to develop a racial equity index for planning and resource allocation is an investment in the long-term sustainability of this work. In addition, targeted resources for language access and digital accessibility in its upcoming FY24 strategies will help the department ensure equitable access to its programs.

### Sample Program-level rating (based on sample program-level response)

Score	Narrative Justification
 <i><b>Strong Likelihood</b> to reduce and eliminate racial disparities and other inequities in Montgomery County</i>	The program demonstrates a strong commitment to racial equity and social justice as it is utilizing demographic data collected thus far (in addition to national research and data) to target resources towards children and communities of color—groups with an expressed need—in accessing devices to help mitigate the Homework Gap. The department has utilized resources provided by ORESJ to help inform their work and have also conducted outside research, being informed by experts in both their relevant fields and racial equity.

## Where can I find help?

ORESJ will provide a training that will be recorded and shared with department users on October 5, 2022. Because **ratings will not be changed after they are transmitted**, ORESJ

strongly recommends taking advantage of this training opportunity. ORESJ will also post a Frequently Asked Questions (FAQ) document on their website as an additional resource to departments completing the FY24 OBET.

## Glossary

- **Black, Indigenous, and People of Color (BIPOC)** A term referring to “Black and/or Indigenous People of Color.” While “POC” or People of Color is often used as well, BIPOC explicitly leads with Black and Indigenous identities, which helps to counter anti-Black racism and Native erasure.
- **Disaggregated data** is information—quantitative or qualitative—that gives insights into the particular experience and circumstances of specific population groups (by race, ethnicity, nativity, gender, disability, etc.). Disaggregating data can help in identifying and unpacking dimensions of a specific inequity or inequitable outcome. When data is not disaggregated and viewed in its aggregate form, it can mask inequities.
- **Ethnicity** A social group that shares a common and distinctive culture, religion, language, history and customs. Throughout US history different ethnic groups, as described above in the definition of “race”, have been racialized as non-white and therefore ethnicity within this context is commonly used in conjunction with race or is implied when describing disparities, disproportionalities, and other inequities.
- **Equity** The guarantee of fair treatment, access, opportunity, and advancement while at the same time striving to identify and eliminate barriers that have prevented the full participation of some groups. The principle of equity acknowledges that there are historically underserved and underrepresented populations, and that fairness regarding these unbalanced conditions is needed to assist equality in the provision of effective opportunities to all groups.
- **Marginalized communities** are communities that have not had equal access to opportunity due to exclusion or harmful policies or practices, including discrimination or disinvestment, which have produced inequities by race and ethnicity and its intersection with gender, nativity, disability, and other identity groups. Terms like “underserved communities”, “disinvested communities”, “underrepresented communities”, and “disadvantaged communities” are similar and depending on the context may more appropriately describe communities that have historically and currently experienced inequities.
- **Race** A social and political construction—with no inherent genetic or biological basis—used by institutions to arbitrarily categorize and divide groups of individuals based on physical appearance (particularly skin color), ancestry, cultural history, and ethnic classification. The concept has been, and still is, used to justify the domination, exploitation, and violence against people who are racialized as non-White. Racial categories subsume ethnic groups.

- **Racial equity** Racial equity is the condition that would be achieved if one's racial identity no longer predicts one's life outcomes. When we use the term, we are thinking about racial equity as one part of racial justice, and thus we also include work to address root causes of inequities, not just their manifestation. This includes elimination of policies, practices, attitudes and cultural messages that reinforce differential outcomes by race or fail to eliminate them.
- **Racial disparity** An unequal outcome one or more racial or ethnic group experiences as compared to the outcome for another racial or ethnic group and their population relative overall population.
- **Racial disproportionality** The underrepresentation or overrepresentation of a racial or ethnic group at a particular decision point, event, or circumstance, in comparison to the group's percentage in the total population.
- **Racial inequity** Race as the number one predictor of life outcomes, e.g., disproportionality in education (high school graduation rates), jobs (unemployment rate), criminal justice (arrest and incarceration rates), life expectancy, etc.
- **Race Equity Lens:** The process of paying disciplined attention to race and ethnicity while analyzing problems, looking for solutions, and defining success. A race equity lens critiques a "color blind" approach, arguing that color blindness perpetuates systems of disadvantage in that it prevents structural racism from being acknowledged. Application of a race equity lens helps to illuminate disparate outcomes, patterns of disadvantage, and root cause.
- **People of Color** Political or social (not biological) identity among and across groups of people that are racialized as non-White. The term "people of color" is used to acknowledge that many races experience racism in the U.S, and the term includes, but is not synonymous with, Black people. Increasingly, the term BIPOC is used in place of "people of color".

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The City of Portland Budget Equity Assessment Tool: <https://www.portlandoregon.gov/transportation/article/707806>

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Washington DC Office of Racial Equity Budget Equity Tool: <https://ore.dc.gov/sites/default/files/dc/sites/ore/publication/attachments/Racial%20Equity%20Budget%20Tool%2010.14.21.pdf>