

FY25 Operating Budget Equity Tool Guidance Manual

THE OFFICE OF RACIAL EQUITY AND SOCIAL JUSTICE

MONTGOMERY COUNTY GOVERNMENT

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Important Updates for the FY25 Operating Budget Equity Tool

Each department is required to respond to department-level OBET questions. You will need to provide an explanation and examples for each activity you identify, in Question #1. There is a 50-character minimum for each required response. Department-level OBET response ratings will be transmitted to the Montgomery County Council along with the County Executive's proposed FY25 Budget.

New this year, not all departments are required to answer program-level OBET questions. Only the following departments are required to submit program-level responses:

Alcohol Beverage Services
Correction and Rehabilitation
Environmental Protection
Fire and Rescue Service
Health and Human Services
Housing and Community Affairs
Police
Recreation
Technology and Enterprise Business Solutions
Transportation

The three bolded departments are required to choose one program per division. The remaining departments above are required to submit a program-level response for one program. Program-level ratings will be used throughout the development of the County Executive's proposed FY25 budget.

Introduction

In accordance with [Bill #27-19](#), 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 development and decision-making. The FY25 Operating Budget Equity Tool (OBET) is designed to help departments articulate the ways in which their proposed budget supports their commitments to advancing racial equity and social justice, while providing decisionmakers with insights regarding the racial equity and social justice impacts of the proposed budget.

This guide provides departments with information about the FY25 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; and
- how responses to the tool will be assessed and used in decision-making processes.

What is the FY25 Operating Budget Equity Tool (OBET) and why is it important?

The OBET is both a product and a process that encourages departments and decision-makers to consider the impacts of their department-level resources, proposed program¹ (service/initiative) enhancements, reductions, and overall budget decisions on racial disparities and inequities in the County.

As a process, this tool prompts users to collaborate with stakeholders across the department to center historical and current racial disparities within the budget development process. Undertaking the information gathering and analysis required in this tool will help users determine whether their proposed budget helps to reduce or widen gaps in outcomes. In this process, the use of disaggregated data and community engagement is key.

As a product, the tool helps users produce information that brings attention to the systemic inequities that create racial disparities, barriers to access, and inequitable outcomes for Black Indigenous and People of Color (BIPOC) and low-income communities. The information that the tool generates draws attention to opportunities where changing the planning, design, or other aspects of a program is likely to lead to more equitable outcomes.

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 those 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 of 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.

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

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. The result of the analysis will be a score and narrative justification, both of which will be transmitted to the Montgomery County Council along with the proposed FY25 budget.

Program-level analysis

ORESJ will identify programs that target resources towards reducing racial disparities and inequities. ORESJ will also identify programs that demand additional attention towards mitigating unintended consequences. The result of the analysis will be a score and narrative justification, both of which will be used throughout the development of the County Executive’s proposed budget.

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

The FY25 OBET

Below is the list of questions and prompts that make up the FY25 OBET. Similar to last year, each department will be asked a series of Department-level questions regarding their proposed FY25 budget. Each required response must be a minimum of 50 characters and will ideally be 4-5 sentences of narrative and include details that address the listed prompts.



Tip: Read through the entirety of the FY25 OBET prior to formulating your response.



Tip: To complete the FY25 OBET, engage relevant staff (CORE Team members and Leads) early and often.

Only ten departments (including three select department divisions) will be required to respond to the OBET program-level questions. Those required to submit program-level responses must do so for one program of their choosing. This program can be new or include an enhancement and/or reduction.

Please keep in mind that the OBET is both a process and a product. Use the OBET prompts throughout budget development. Keep in mind that as a product, your responses to OBET questions are the primary source of information for ORESJ's analysis and assessment. The result of the assessment is a rating and narrative justification that will be used by various decision-makers in the budget deliberation process.

Tool Questions

Department-level question

1. **(Required)** How will your overall FY25 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 explanation box to the right of the activity, please describe how your budget targets resources towards these efforts. *****Of note**, self-reporting by simply selecting activities will not constitute a complete response. **In order for responses to be considered complete**, you must substantiate it with evidence/supplemental information that supports your claim in the explanation section.

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*
- *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*
- *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*

Normalize

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.

Does your proposed FY25 Operating Budget enable the following activities?

- Allocate specific resources (staff time, budgetary, etc.) for CORE team activities
 - ☐ Yes
 - ☐ No
 - ☐ Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- Develop a racial equity vision statement (and/or racial equity and social justice mission, values, or guiding principles)
 - ☐ Yes
 - ☐ No
 - ☐ Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- We're doing something else and will use the text box to describe.
 - ☐ Yes
 - ☐ N/A

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable the *normalizing* activities you're undertaking.)

50 character minimum

- Our proposed FY25 budget will not enable us to make commitments in this area and will use the text box to explain any challenges or barriers we're having.
 - Yes
 - N/A

(If you answered yes, please use the textbox below to explain your response and any challenges or barriers you're currently experiencing or anticipating in FY25.

50 character minimum

Organize

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.

Does your proposed FY25 Operating Budget enable the following activities?

- Implement a plan or policy requiring all staff and leadership to complete eight hours of racial equity and social justice training, as required in the RESJ Act.
 - Yes
 - No
 - Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- 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.
 - Yes
 - No
 - Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- Designate resources (such as funding or paid staff time) for staff participation in GARE conferences and/or other department-specific racial equity and social justice professional development.
 - Yes
 - No
 - Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- We're doing something else and will use the text box to describe.
 - Yes
 - N/A

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable the *organizing* activities you're undertaking.)

50 character minimum

- Our proposed FY25 budget will not enable us to make commitments in this area and will use the text box to explain any challenges or barriers we're having.
 - Yes
 - N/A

If you answered yes, please use the textbox below to explain your response and any challenges or barriers you're currently experiencing or anticipating in FY25.

50 character minimum

Operationalize

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.

Does your proposed FY25 Operating Budget enable the following activities?

- 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.
 - Yes

- ☐ No
- ☐ Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- Track program access and service outcomes by race, ethnicity, and other relevant demographic or socioeconomic characteristics
 - ☐ Yes
 - ☐ No
 - ☐ Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- Using or creating department-specific racial equity tools or maps (in conjunction with other tools and resources) to support analysis (of policy, program, practice, procedure) or resource decisions.
 - ☐ Yes
 - ☐ No
 - ☐ Unsure

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable this activity. If you indicated no, please tell us why or what challenges you're anticipating. If you indicated unsure, please tell us why.)

50 character minimum

- We're doing something else and will use the text box to describe.
 - ☐ Yes
 - ☐ N/A

Please use the textbox below to explain your response. (If you indicated yes, please provide examples of how your proposed FY25 budget will enable the *operationalizing* activities you're undertaking.)

50 character minimum

- Our proposed FY25 budget will not enable us to make commitments in this area and will use the text box to explain any challenges or barriers we're having.
 - Yes
 - N/A

If you answered yes, please use the textbox below to explain your response and any challenges or barriers you're currently experiencing or anticipating in FY25.

50 character minimum

2. **(Optional)** 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: deficiencies in the on-going funding of your base budget that inhibit your department's racial equity and social justice efforts; 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).

50 character minimum

3. **(Required)** Please describe the process by which your department will approach meeting the required reduction request for FY25. Specifically, please detail any undue burden on BIPOC, low-income, or historically marginalized groups that may occur as a result of the budget reduction. How will your department work to mitigate any harm these burdens may cause?

50 character minimum

Program-level questions

1. **(Required)** What is the purpose of this program (this may also be a service, initiative, activity)? In your response, please list the outputs, outcomes, and strategic program goals as well as who the target or primary beneficiaries are (this includes providing demographic information such as race, ethnicity, immigration or refugee status, age, gender, socioeconomic status, location, etc..)

50 character minimum

2. **(Required)** Identify specific disparities and/or inequities that are targeted by your program budget proposal. Please refer to the [2023 Updated Baseline Study](#) and related [Racial Equity Impact Assessments](#) and [Racial Equity and Social Justice Impacts Statements](#). Include any qualitative and quantitative data to support your answer.

50 character minimum

3. **(Required)** How will this program impact the people most negatively affected/harmed by the challenges this program addresses? (think about how the program impacts marginalized groups or communities. Example communities include (but are not limited to) Black, Indigenous, and People of Color communities, low-income individuals/households, immigrants or refugees, communities that have historically experienced disinvestment in physical environments, justice-involved youth, or people with disabilities.

50 character minimum

4. **(Required)** Describe how the needs of a specific community or stakeholder informed development of the program, its goals and requested budget. How is that information reflected in the budget proposal?

50 character minimum

For program requests involving reductions, please respond to the following questions. If your program request does not involve reductions, please respond N/A.

5. **(Required)** How will reductions to this program affect the users of the program, specifically those most negatively impacted by the challenges this program addresses?
6. **(Required)** 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?

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 practices² 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?



Tip: Leverage the County's resources:

- ✓ ORESJ's library of [Racial Equity Impact Assessments](#) and The Office of Legislative Oversight's collection of [Racial Equity and Social Justice Impact Statements](#), can help you learn about the intersection of racial equity and the policy or issue area you work in.
- ✓ Utilize resources available on the [Government Alliance on Race and Equity \(GARE\)](#) portal.

² 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

- 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.

In addition, as you reference previous budget years and/or program decisions that inform your current budget requests, please look for and include information about the data and processes used to formulate those requests (Is this request required by statute or policy change? Does it involve grant funding and eligibility criteria tied to that funding? Etc.) As you explain the background of the program or proposed change, please include to what extent impacted community members were engaged. Provide details regarding outreach strategies, other implementation partners, demographic characteristics of attendees, and any community feedback received.

Please note that the presence of a program or project in an Equity Emphasis Area or other such designated "Equity" areas is not sufficient evidence that a program is likely to reduce disparities or inequities. While geographic location and census tract demographics are critical pieces of data, without analysis, these factors alone do not indicate that a specific disparity or inequity is likely to be reduced or eliminated by the presence of the program.

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."³

1. **Montgomery County Racial Equity Profile Update (2023):** This profile, a publication of the Office of Racial Equity and Social Justice, 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/ORE/Resources/Files/JUPITERRACIALEQUITYPROFILE.pdf>

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

2. **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>
3. **Statistical Atlas:** A comprehensive atlas produced by the Census Bureau, and a source for disparity data: <https://statisticalatlas.com/county/Maryland/Montgomery-County/Overview>
4. **The Office of Racial Equity and Social Justice Racial Equity Impact Assessments (REIAs) of Special/Supplemental Appropriations:** ORESJ has conducted more than 150 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>
5. **CountyStat Community Explorer:** CountyStat developed this Explorer tool to help educate stakeholders on the shifting characteristics of Montgomery County neighborhoods and inform relevant discussion and policymaking.
<https://www.montgomerycountymd.gov/countystat/explorer.html>
6. **Health 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>
7. **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/>

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, meetings, and related public policy research.



Tip: When it comes to data analysis, check in with your Racial Equity Core Team Lead, who may be able to direct you to department-specific racial equity tools or maps.

8. **Tableau Racial Equity Data Hub:** The platform provides access to relevant data, analyses, and resources to advance data work in the racial, equity, and justice space. <https://www.tableau.com/foundation/data-equity>
9. **ESRI Racial Equity GIS Hub:** The hub is an ongoing and continuously expanding resource to assist organizations working to address racial inequities. It includes data layers, maps, applications, user examples, training resources, articles on best practices, solutions, and other resources. <https://gis-for-raciaequity.hub.arcgis.com/>
10. **Justice40 Climate and Economic Justice Screening Tool:** The tool is a geospatial mapping tool designed to identify disadvantaged communities that are marginalized and overburdened by pollution and underinvestment. The tool has an interactive map and uses datasets that are indicators of burdens in eight categories: climate change, energy, health, housing, legacy pollution, transportation, water and wastewater, and workforce development. Census tracts that are overburdened and underserved are highlighted as being disadvantaged on the map. <https://screeningtool.geoplatform.gov/en/>

Sample responses to the FY25 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 (Required)

...**First**, indicate which activities under the GARE framework this proposed FY25 budget enables your department to commit to and undertake. **Then**, in the explanation box, please describe how your budget targets resources towards these efforts. *****Of note**, self-reporting by simply selecting activities will not constitute a complete response. **In order for responses to be considered complete**, you must substantiate them with evidence/supplemental information that supports your claim in the explanation section*** ...

GARE Framework	Normalize	Organize	Operationalize
Commitment	<ul style="list-style-type: none"> ✓ 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 textbox to describe. 	<ul style="list-style-type: none"> ✓ Implement a plan or policy requiring all staff and leadership to complete eight hours of racial equity and social justice training, as required in the RESJ Act. ✓ Designate resources (such as funding or paid staff time) for staff participation in GARE conferences and/or other department-specific racial equity and social justice professional development. ✓ We're doing something else and will use the text box to describe. 	<ul style="list-style-type: none"> ✓ 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. ✓ 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 (in conjunction with other tools and resources) to support analysis (of policy, program, practice, procedure) or resource decisions. ✓ We're doing something else and will use the text box to describe.
Text box explanation	<p>We've allocated 15% of the CORE Team Lead's time to work with CORE team members to develop a Racial Equity Action Plan and advise department leadership on racial</p>	<p>To build the capacity of our department to use a racial equity lens, we've developed a policy requiring all new staff to complete required RESJ Act Trainings within their first three months of employment.</p> <p>We've allocated funding for the participation of three CORE team members to attend the annual</p>	<p>We've become increasingly aware that our recruitment process is not yielding the diverse pool of candidates we'd like. We're conducting a focus group among hiring managers to get clear about pain points and will pilot new</p>

GARE Framework	Normalize	Organize	Operationalize
	<p>equity issues in our policy area.</p> <p>We've set aside time during our Senior Management Retreat in August 2024 to finalize the Racial Equity Vision Statement proposed by the CORE team.</p> <p>"Doing something else": We're designating part of our Q2 all-staff meeting in FY25 to do a documentary viewing about the history of structural racism and our issue area.</p>	<p>GARE Conference. In addition, we've allocated funding for our department's procurement specialists to participate in a regional contracting for equity conference.</p> <p>"Doing something else": We've designated staff time for our onsite managers to informally partner with Office of Community Partnerships and two local non-profits to ensure our policies and procedures respond to community concerns about culturally competent and linguistically appropriate childcare options at the job training centers near our facility.</p>	<p>recruitment strategies as a result.</p> <p>We're collaborating with colleagues in two neighboring jurisdictions to determine a core set of performance metrics that we can disaggregate by race, gender, and income. Our goal is figure out whether our program is having different effects on different subpopulations. Working with a few other jurisdictions will help us learn about best practices.</p> <p>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.</p> <p>"We're doing something else": We anticipate two new grants in FY25 and will use ORESJ's REIAs and OLO's RESJISs about housing and jobs during our design phase.</p>

SAMPLE RESPONSE QUESTION 2 (Optional)

.... 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 the 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 RESPONSE QUESTION 3 (Required)

In anticipation of a 3% reduction, we've mapped our client population for our three largest programs to determine where there are concentrations of BIPOC and low-income clients. While we shift resources, we will ensure there is sufficient coverage in these core areas as these locations are where residents are most likely experiencing racial disparities in income and housing cost-burden, and as a result have the greatest need with fewer alternatives. We'll develop communications materials to ensure all clients know that if their closest facility is closed, they can access services at core sites. We hope that this approach will minimize disruption of service in areas where clients are experiencing the greatest need.

Sample Program-Level Response

Remember! Only one-program level response is required for departments (and select department's divisions) listed at the beginning of this guide

The following is a sample program-level response. The sample is based on an adaptation of the Montgomery Connects - Computer for You program – 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 but are nonetheless realistic.

- 1. (Required)** What is the purpose of this program (this may also be a service, initiative, activity)? In your response, please list the outputs, outcomes, and strategic program goals as well as who the target or primary beneficiaries are (this includes providing demographic information such as race, ethnicity, immigration or refugee status, age, gender, socioeconomic status, location, etc..)

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-19, which built upon the federal E-rate program. It provides 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. This was imperative during the height of the COVID-19 pandemic as school and library Wi-Fi and computers could not be accessed as a result of mandatory closures. The goal of this COVID-19 relief is to help close the Homework Gap for students who currently lack access to the internet or the devices they need to connect to the classroom.

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. **(Required)** Identify specific disparities and/or inequities that are targeted by your program budget proposal. Please refer to the 2023 Updated Baseline Study and related Racial Equity Impact Assessments and Racial Equity and Social Justice Impacts Statements. Include any qualitative and quantitative data to support your answer.

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 household’s 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 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. 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 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 are almost double for households making less than \$25,000 a year.

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

3. **(Required)** How will this program impact the people most negatively affected/harmed by the challenges this program addresses? (Think about how the program impacts marginalized groups or communities. Example communities include (but are not limited to) Black, Indigenous, and People of Color communities, low-income individuals/households, immigrants or refugees, communities that have historically experienced disinvestment in physical environments, justice-involved youth, or

people with disabilities.

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 principles, 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. **(Required)** Describe how the needs of a specific community or stakeholder informed development of the program, its goals and requested budget. How is that information reflected in the budget proposal?

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. Results 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 (19%).

For program requests involving reductions, please respond to the following questions. If your program request does not involve reductions, please respond N/A.

5. **(Required)** How will reductions to this program affect the users of the program, specifically for those most negatively impacted by the challenges this program addresses?

As resources provided by the federal Emergency Connectivity Fund have been encumbered, eligibility standards have now been put in place as the new source of funds for the program (the state Maryland Connected Devices program) are not as robust as the previously provided federal funds. As such, those experiencing the greatest barriers in accessing a device or internet will be prioritized. Specifically, Montgomery County residents, age 7 or older, who have not previously received a computer from the County, will be prioritized for distribution efforts. Additionally, in order to receive a Chromebook, these children must be from households that are eligible for the ACP (Affordable Connectivity Program) internet discount program, either by income or enrollment in a benefit program. As a result, while children in families with the greatest expressed needs will be prioritized for resource distribution, those barely making ends meet – households whose incomes are over 200% of the federal poverty level (or \$39,440 for 2 people) – may be excluded

from opportunities to receive a device or internet access.

6. **(Required)** 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?

As previously stated, new eligibility standards have now been put in place that prioritize those experiencing the greatest barriers in accessing devices and internet. In an effort to track and measure service outcomes as well as the additional need for groups who fall outside of the eligibility thresholds – particularly for low-income children of color – the program will continue ongoing engagement efforts that include surveys, focus groups, and other means of follow-up. As trends begin to reveal themselves, the program will revisit its eligibility requirements to ensure that the needs of school-aged children are met.

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 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 *substantiated* commitment (receiving a total score of 11) is demonstrated by a budget that targets resources towards activities across all three areas of the GARE framework while also mitigating any harmful impacts as a result of reductions. Ratings will consider departments' narrative explanations in addition to any other 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 a total score of 4. 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 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 FY25 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

Departments will receive a single point for each *substantiated* activity or commitment their FY25 budget will enable. You will be required to provide a minimum of a 50-character response for each activity or commitment you select. Your explanations should demonstrate what specifically you intend to do, how, and why it will help you advance your department’s commitment to and infrastructure for racial equity and social justice. ORESJ will review your responses, award points for substantiated responses and provide a cumulative score and narrative justification for the score. The department-level score and ORESJ’s narrative justification will be shared with department directors, OMB, the County Executive, and the Montgomery County Council.

Normalize

The goal of the normalizing is to 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.

Does your proposed FY25 Operating Budget enable the following activities?

Activity and/or commitment	Score for substantiated response
• Allocate specific resources (staff time, budgetary, etc.) for CORE team activities	1
• Develop a racial equity vision statement (and/or racial equity and social justice mission, values, or guiding principles)	1
• We’re doing something else and will use the text box to describe.	1
• Our proposed FY25 budget will not enable us to make commitments in this area and will use the text box to explain any challenges or barriers we’re having.	0
Total possible points	3

Organize

The goal of organizing is to 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.

Does your proposed FY25 Operating Budget enable the following activities?

Activity and/or commitment	Score for substantiated response
<ul style="list-style-type: none">Implement a plan or policy requiring all staff and leadership to complete eight hours of racial equity and social justice training, as required in the RESJ Act.	1
<ul style="list-style-type: none">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.	1
<ul style="list-style-type: none">Designate resources (such as funding or paid staff time) for staff participation in GARE conferences and/or other department-specific racial equity and social justice professional development.	1
<ul style="list-style-type: none">We're doing something else and will use the text box to describe.	1
<ul style="list-style-type: none">Our proposed FY25 budget will not enable us to make commitments in this area and will use the text box to explain any challenges or barriers we're having.	0
Total possible points	4

Operationalize

The goal of operationalizing is to 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.

Does your proposed FY25 Operating Budget enable the following activities?

Activity and/or commitment	Score for substantiated response
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<ul style="list-style-type: none"> 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. 	1
<ul style="list-style-type: none"> Track program access and service outcomes by race, ethnicity, and other relevant demographic or socioeconomic characteristics 	1
<ul style="list-style-type: none"> Using or creating department-specific racial equity tools or maps (in conjunction with other tools and resources) to support analysis (of policy, program, practice, procedure) or resource decisions. 	1
<ul style="list-style-type: none"> We're doing something else and will use the text box to describe. 	1
<ul style="list-style-type: none"> Our proposed FY25 budget will not enable us to make commitments in this area and will use the text box to explain any challenges or barriers we're having. 	0
Total possible points	4

Total possible points across the GARE framework = 11

0	The Department-level budget does not yet demonstrate a commitment to advancing racial equity and social justice in Montgomery County.
1-4	The Department-level budget demonstrates an emerging commitment to advancing racial equity and social justice in Montgomery County.
5-7	The Department-level budget demonstrates a commitment to advancing racial equity and social justice in Montgomery County.
8-10	The Department-level budget demonstrates a strong commitment to advancing racial equity and social justice in Montgomery County. Departments scoring 9 and above have indicated a commitment across all three areas of the GARE framework.
11	The Department-level budget demonstrates an exemplary commitment to advancing racial equity and social justice in Montgomery County.

Program-Level Rubric

Assessment	Rating	Explanation
<i>Does Not</i> reduce and/or eliminate racial disparities and other inequities in Montgomery County	0	The program <u>as described</u> does not reduce and/or eliminate racial disparities and other inequities or advance equitable outcomes for members of the community.
<i>Unlikely</i> to reduce and/or eliminate racial disparities and other inequities in Montgomery County	1	The program <u>as described</u> is unlikely to reduce and/or 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.
<i>Potential</i> to reduce and/or eliminate racial disparities and other inequities in Montgomery County	2	The program <u>as described</u> maintains current levels of operation and outcomes. While there is a potential to reduce and/or eliminate racial disparities and other inequities in the County, there is insufficient evidence linking the program to more equitable outcomes.
<i>Likely</i> to reduce and/or eliminate racial disparities and other inequities in Montgomery County	3	The program <u>as described</u> is likely to reduce and/or 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.
<i>Strong Likelihood</i> to reduce and/or eliminate racial disparities and other inequities in Montgomery County	4	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.

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
<p>11</p> <p>The Department-level budget demonstrates an exemplary commitment to advancing racial equity and social justice in Montgomery County.</p>	<p>The department demonstrates an exemplary commitment to racial equity and social justice. It has allocated resources in its FY25 budget for 11 activities and commitments that target resources towards ensuring staff have the capacity and time to develop strategies and plans that center racial equity and social justice. The department is also maximizing its organizing efforts through strategic partnerships that will strengthen its foundational RESJ capabilities. 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. Further, the department is leveraging ORESJ REIAs and OLO RESJIS to help embed a racial equity analysis in the design of two upcoming grant requests.</p>

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

Score	Narrative Justification
<p>4</p> <p>Strong Likelihood to reduce and eliminate racial disparities and other inequities in Montgomery County</p>	<p>The program as described demonstrates a strong likelihood of advancing equitable outcomes as it utilizes collected demographic data (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 has also conducted outside research, being informed by experts in both their relevant field as well as racial equity.</p>

Glossary

- **Black, Indigenous, and People of Color (BIPOC)** is 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.
- **Capital Improvements Program Budget Equity Tool (CBET)** is both a product and a process that encourages departments and decisionmakers to consider the impacts of their proposed projects, project amendments, and budget decisions on racial disparities and inequities in the County.
- **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** refers to 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** is 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.
- **People of Color** refers to the 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”.

- **Race** is 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** 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 the root causes of inequities, not just their manifestation. This includes the elimination of policies, practices, attitudes, and cultural messages that reinforce differential outcomes by race or fail to eliminate them.
- **Racial disparity** is an unequal outcome one or more racial or ethnic groups experience as compared to the outcome for another racial or ethnic group and their population relative overall population.
- **Racial disproportionality** is 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 Equity Impact Assessment** is a systematic examination of how different racial and ethnic groups will likely be affected by a proposed action or decision.
- **Racial inequity** Race is 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** is 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. The application of a race equity lens helps to illuminate disparate outcomes, patterns of disadvantage, and root causes.
- **Systems thinking** can help people understand why changes in multiple sectors are necessary to make genuinely sustainable progress towards racial equity in particular spheres such as education, health, or economic security. It can thus help identify both entry points for change and links among those entry points.
- **Unintended Consequences** are the outcomes of an action that are not anticipated. These occur when the intended goals or outcomes of a particular action or intervention are not fully realized or when unanticipated side effects emerge.

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