

# FY27 Operating Budget Equity Tool Guidance Manual

**OFFICE OF RACIAL EQUITY AND SOCIAL JUSTICE**

**MONTGOMERY COUNTY GOVERNMENT**

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# Important Updates for the FY27 Operating Budget Equity Tool

As in previous years, each department is required to respond to department-level OBET questions. There is a character minimum for each required response (you will not be able to skip required questions). *This year, the result of ORESJ's department-level analysis will be a **Findings Statement, a numerical commitment rating, and a narrative explanation.***

**NEW THIS YEAR: ALL departments are required to answer program-level OBET questions.** Each department will select a program and indicate whether the program is new or is requesting enhancements, reductions, or a same services

budget. **\*\*Departments are advised to NOT select a program (or programs) funded with Federal dollars**

**\*\* Departments that do not have specific programs in BASIS will respond to program-level questions using their department, and any requested budget changes, as the subject of their response. The result of ORESJ's program-level analysis will be a numerical rating and narrative justification which will be used throughout the development of the County Executive's proposed FY27 budget.**

**The following departments are required to submit a program-level response for each of its divisions:**

- Health and Human Services,
- Transportation, and
- Environmental Protection.

## 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 FY27 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 FY27 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 FY27 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 program<sup>1</sup> (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 their department and to center historical and current racial disparities throughout budget development. The information gathering and analysis required to complete 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. Over the years, we’ve found that the following practices are helpful for successfully completing the OBET:

- Assigning a departmental point-person to coordinate OBET response drafts, reviews, and approvals.
- Ensuring that relevant staff (including, but not limited to, CORE teams and team leads, program staff, and community outreach staff) receive this guidance manual and other OBET-related communications.
- Attending ORESJ provided office hours prepared with relevant department-specific questions.

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 (including resource allocations) is likely to lead to more equitable outcomes.

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

## 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.

## How will responses to the OBET be used?

Responses to the FY27 OBET will be analyzed by ORESJ and result in a ***department-level Findings Statement, a numerical commitment rating, and a narrative justification, in addition to a program-level numerical rating and accompanying narrative justification***. This analysis will be shared with departments and decisionmakers, along with recommendations related to which budget requests (based on available information) are likely to advance equitable access or outcomes for communities identifying as BIPOC and low-income. Additionally, ORESJ will identify budgets that demand additional attention to mitigate unintended consequences disproportionately burdening BIPOC and low-income communities.

### Department-level analysis

ORESJ will analyze department-level OBET responses and determine the department's level of commitment to advancing racial equity and social justice in FY27. The result of the analysis will be one of the following Findings Statements:

- ✓ (3-5) Department demonstrates an **“Emergent commitment to advancing racial equity and social justice**

- ✓ (6-8) Department demonstrates a **“Sustained commitment to advancing racial equity and social justice**
- ✓ (9-11) Department demonstrates a **“Proactive and Strategic commitment to advancing racial equity and social justice”**

The Findings Statements will be accompanied by a narrative explanation, which will be shared with OMB and the County Executive and transmitted to the Montgomery County Council along with the proposed FY27 budget.

## Program-level analysis


ORESJ will analyze department-selected programs and the extent to which proposed budget requests will target resources towards reducing racial disparities and inequities. ORESJ may also identify programs that demand additional attention towards mitigating unintended consequences. The result of the analysis will be a numerical 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 FY27 OBET

Below is the list of questions and prompts that make up the FY27 OBET. As in previous years, each department will be asked a series of Department-level questions regarding their proposed FY27 budget. Respondents will be prompted to self-select the level of commitment they anticipate in FY27 for each area of the GARE framework. Each level of commitment has a corresponding numerical value:

- Preliminary Commitment = +1
- Commitment = +2
- Strong Commitment = +3

 **Tip:** Read through the entirety of the FY27 OBET prior to formulating your response.

Each response must be a minimum of 50 characters and will ideally be 4-5 sentences of narrative and include details about how you plan to use existing and/or proposed resources to demonstrate your commitment to advancing racial equity and social justice in FY27.



**Tip:** To complete the FY27OBET, engage relevant staff (Core team members and leads) early and often.

**All departments are required to respond to the OBET program-level questions.** Each department must submit one program-level response; DEP, DOT, and DHHS are required to submit one program-level response per division. Departments will choose a program and will select whether the program is

requesting an enhancement, reduction, neither an enhancement nor reduction (same-services budget), or if you are requesting a new program. For departments with no specific programs in BASIS, your department itself will serve as your program; responses should address your department's proposed budget changes. If your department is requesting a same-services budget, select "neither enhancement nor reduction." Please note that departments requesting a same-services budget may receive follow-up from ORESJ for clarification or additional information.

**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 rating and narrative justification will be used by various decision-makers in the budget**

## Tool Questions

### Department-level question

1. **(Required)** Please explain how your overall FY27 budget request supports the department's commitment to advancing racial equity and social justice.

**Instructions:** For each area of the GARE framework, please indicate your level of commitment, using existing and/or planned resources in FY27, by selecting one of the provided options. More information about the GARE framework is below and [here](#).

*The Government Alliance on Race and Equity (GARE) recommends the visualize, 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 how your department is doing the following:*

- *Visualize—Visioning process, lead with values and vision. Articulate a clear, shared vision for advancing racial equity and social justice that is reflected in its mission, strategic goals, or leadership priorities*
- *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*

**You must substantiate your selection with evidence/supplemental information that supports your response in the explanation section. Your explanations should demonstrate what specifically you intend to do, how you intend to do it, and why it will help advance your department’s FY27 commitment to, and infrastructure for, racial equity and social justice.**

**Note:** While not required, you’re encouraged to reference ORESJ’s FY26 Abbreviated SWOT analysis for your department and highlight any progress on the identified strengths and opportunities noted by ORESJ. Should you want to discuss new efforts underway, please share these as well.

### **Visualize**

*Visualize—Visioning process, lead with values and vision. Articulate a clear, shared vision for advancing racial equity and social justice that is reflected in its mission, strategic goals, or leadership priorities*

**Instructions:** Please select the option that best describes the status of your department’s visualizing efforts.

- ☐ Completed, resulting in a department racial equity vision and/or mission statement (+2)
- ☐ In Process, with department and/or CORE team discussions and/or draft racial equity vision/mission statement underway (+1)



- ☐ Not yet started, with no process or plan in place for completing (+0)

**In the textbox below,** please include your department’s racial equity vision/mission statement. This can include a link to where it is located on your website, a finalized version if it is not publicly available, or the draft version. If your office or department has no racial equity vision/mission statement in either a finalized or draft form, please detail what efforts have been made in this area thus far (this can include initial research, brainstorming efforts, agenda setting, etc.). For those without a racial equity vision/mission statement or current plans to attempt to create one, please provide a detailed explanation as to why, including any barriers that have precluded you from doing so up until this point.

50 character minimum

**Instructions:** For each of the remaining prompts, please use the definitions below to guide your self-selection:

Preliminary Commitment (+1)	Commitment (+2)	Strong Commitment (+3)
Departments at this level are in the initial stages of recognizing the importance of normalizing/organizing/operationalizing for racial equity and social justice. They are taking preliminary steps to raise awareness, build a shared understanding, and comply with the basic requirements of the RESJ Act.	Departments at this level are actively engaged in implementing policies, practices, procedures, processes, and appropriate resource allocations that aid the department in normalizing/organizing/operationalizing for racial equity and social justice to move beyond compliance to apply intentional use of a racial equity lens.	Departments at this level are actively engaged in implementing, evaluating, and improving policies, practices, procedures, processes, and appropriate resource allocations that aid the department in normalizing/organizing/operationalizing for racial equity and social justice—fostering intentional use of a racial equity lens while building systems to sustain and embed the work long term.

### **Normalize**

*Normalize—Building awareness and shared understanding. 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.*

**Please indicate your level of commitment, using existing and/or planned resources in FY27.**

- ☐ Preliminary Commitment
- ☐ Commitment
- ☐ Strong Commitment

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.*

**Please indicate your level of commitment, using existing and/or planned resources in FY27.**

- ☐ Preliminary Commitment
- ☐ Commitment
- ☐ Strong Commitment

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.*

**Please indicate your level of commitment, using existing and/or planned resources in FY27.**

- ☐ Preliminary Commitment
- ☐ Commitment
- ☐ Strong Commitment

50 character minimum

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**2. (Required)** Please select your department's main barrier or challenge to advancing racial equity and social justice. Please use the textbox below to explain.

- ☐ Resources (funding/staffing)

- ☐ Change Management
- ☐ Regulatory/Compliance
- ☐ External Factors (i.e. Federal funding requirements)
- ☐ Other

50 character minimum

## Program-level questions

Instructions: Each department is responsible for selecting one program to use in responding to program-level OBET questions. Select departments are required to choose more than one program; these departments have been notified by ORESJ. If you did not receive a message from ORESJ regarding additional program-level responses it is because your department is only required to submit a response for one program.

**For departments with no specific programs in BASIS,** your department itself will serve as your program; responses should address your department's proposed budget changes. If your department is requesting a same-services budget, select "neither enhancement nor reduction." Please note that departments requesting a same-services budget may receive follow-up from ORESJ for clarification or additional information.

**\*\*Departments are advised to NOT select a program (or programs) funded with Federal dollars \*\***

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For the program you selected, please indicate whether your budget proposal includes a new program, an enhancement, reduction, or none of the above (a same-services budget). Please select only one option.

- ☐ Enhancement
  - ☐ Reduction
  - ☐ Neither reduction nor enhancement
  - ☐ New program
- 

***\*\*Depending on your selection, you will respond to one of the following sets of questions\*\****

### **Enhancement**

1. **(Required)** What is the purpose of this program (this may also be a service, initiative, or activity) and what is the enhancement you're requesting? 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, disability, socioeconomic status, location, etc.).

50 character minimum

2. **(Required)** Identify specific disparities and/or inequities that are targeted by this program. 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 does this program impact the people who are most negatively affected/harmed by the challenges this program seeks to address and how will the requested enhancement improve the program's effectiveness in addressing those challenges? 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 implementation. How is that information reflected in the enhancement request?

50 character minimum

5. **(Optional)** Which of the CE's priority initiatives does this request *most* relate to (use the priority list below and descriptions offered [here](#)), please select one.

☐ Thriving Youth and Families

- ☐ A Growing Economy
- ☐ A Greener County
- ☐ Easier Commutes
- ☐ A More Affordable and Welcoming County for a Lifetime
- ☐ Safe Neighborhoods
- ☐ Effective Sustainable Government

Two character minimum

### **Reduction**

1. **(Required)** What is the purpose of this program (this may also be a service, initiative, activity) and what is the reduction you're requesting? 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, disability, socioeconomic status, location, etc.).

50 character minimum

2. **(Required)** Identify specific disparities and/or inequities that are targeted by this program. 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 does this program impact the people who are most negatively affected/harmed by the challenges this program seeks to address? 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)** How will reductions to this program affect the users of the program, specifically those most negatively impacted by the challenges this program addresses?

50 character minimum

5. **(Required)** Describe how the needs of a specific community or stakeholder informed development of the program, its goals and implementation. How is that information considered in the reduction request?

50 character minimum

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?

50 character minimum

7. **(Optional)** Which of the CE's priority initiatives does this request *most* relate to (use the priority list below and descriptions offered [here](#)), please select one.

- ☐ Thriving Youth and Families
- ☐ A Growing Economy
- ☐ A Greener County
- ☐ Easier Commutes
- ☐ A More Affordable and Welcoming County for a Lifetime
- ☐ Safe Neighborhoods
- ☐ Effective Sustainable Government

Two character minimum

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### **New Program**

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,

50 character minimum

gender, disability, socioeconomic status, location, etc.).

2. **(Required)** Identify specific disparities and/or inequities that are targeted by this program. 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 does this program impact the people who are most negatively affected/harmed by the challenges this program seeks to address and how will the requested enhancement improve the program's effectiveness in addressing those challenges? 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 implementation. How is that information reflected in the request?

50 character minimum

5. **(Optional)** Which of the CE's priority initiatives does this request *most* relate to (use the priority list below and descriptions offered [here](#)), please select one.

- ☐ Thriving Youth and Families
- ☐ A Growing Economy
- ☐ A Greener County
- ☐ Easier Commutes
- ☐ A More Affordable and Welcoming County for a Lifetime
- ☐ Safe Neighborhoods
- ☐ Effective Sustainable Government

Two character minimum

### **Neither Reduction nor Enhancement (Same Services Budget)**

- ☐ I attest that the department is requesting a same services budget and does not have any program changes—no reductions, nor enhancements.

**\*\*Please note that ORESJ may follow up to confirm the status of your program-level response and request additional information to verify that your department is not requesting any changes that are eligible for OBET review.**

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### General Questions

Please answer the following questions regarding overall completion of the FY27 OBET.

1. **(Required)** Please provide information on your racial equity and social justice lead and Core Team.

- a. Who is your equity lead?

Two character minimum

- b. How frequently does your Core team meet?

Two character minimum

2. **(Required)** 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).)

Two character minimum

- 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.)

Two character minimum

- c. Have you reviewed any Racial Equity Impact Assessments (or other related equity analyses)?

Two character minimum



3. **(Required)** 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)

Ten character minimum

b. If different from above, Departmental Director: (Name)

4. **(Optional)** Please upload any documents that will aid in the explanation of how the proposed budget aligns with the County's policy of reducing and eliminating racial disparities and inequities.

Two character minimum

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## Who should complete the OBET?

Completing the OBET will likely require input from multiple stakeholders. 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 the 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:

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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)

- 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.



**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.

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 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.**

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-SPECIFIC DATA RESOURCES

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:  
[www.montgomerycountymd.gov/ORE/Resources/Files/JUPITERRACIALEQUITYPROFILE.pdf](http://www.montgomerycountymd.gov/ORE/Resources/Files/JUPITERRACIALEQUITYPROFILE.pdf).
2. **Statistical Atlas.** A comprehensive atlas produced by the Census Bureau, and a source for disparity data: [www.statisticalatlas.com/county/Maryland/Montgomery-County/Overview](http://www.statisticalatlas.com/county/Maryland/Montgomery-County/Overview).
3. **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: [www.montgomerycountymd.gov/ore/appr.html](http://www.montgomerycountymd.gov/ore/appr.html).
4. **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:  
[www.montgomerycountymd.gov/countystat/explorer.html](http://www.montgomerycountymd.gov/countystat/explorer.html).
5. **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:  
[www.montgomerycountymd.gov/HHS/Resources/Files/Health%20in%20Montgomery%20County%202010-19.pdf](http://www.montgomerycountymd.gov/HHS/Resources/Files/Health%20in%20Montgomery%20County%202010-19.pdf).



**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-

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<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:

6. **Health Equity in Montgomery County, MD.** Healthy Montgomery Core Indicators 2013-2021: Findings of this report serve as a source of knowledge, bring attention to areas of success and weakness, and will serve as a basis for further multi-layered analysis by stakeholders to understand what specific factors are driving sustained gaps in outcomes, and to aid in designing appropriate programming and interventions to address these disparities:  
[www.montgomerycountymd.gov/HHS/Resources/Files/Reports/Health%20Equity%20Report%20HM%20Core%20Measures%202013-2021.pdf](http://www.montgomerycountymd.gov/HHS/Resources/Files/Reports/Health%20Equity%20Report%20HM%20Core%20Measures%202013-2021.pdf).
7. **Community Health Needs Assessment 2023.** This CHNA report details the health and socioeconomic needs of the Montgomery County community as shared from the perspectives of community members and stakeholders:  
[www.montgomerycountymd.gov/healthymontgomery/Resources/Files/HM-Resources/Publications/Montgomery-County-2023-CHNA.pdf](http://www.montgomerycountymd.gov/healthymontgomery/Resources/Files/HM-Resources/Publications/Montgomery-County-2023-CHNA.pdf).

## INTERACTIVE DASHBOARDS & DATA PLATFORMS

8. **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.:  
[www.nationalequityatlas.org/indicators](http://www.nationalequityatlas.org/indicators).
9. **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://www.datacenter.kidscount.org) — that assesses child well-being in the United States: [www.datacenter.kidscount.org](https://www.datacenter.kidscount.org).
10. **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:  
[www.tableau.com/foundation/data-equity](http://www.tableau.com/foundation/data-equity).
11. **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: [www.gis-for-racialequity.hub.arcgis.com](http://www.gis-for-racialequity.hub.arcgis.com).
12. **Urban Institute Data Catalog.** The catalog is a place to discover and download open data provided by Urban Institute researchers and data scientists. Topics include race and ethnicity, income and wealth, housing, health, criminal justice, education, and economic mobility, etc.: [datacatalog.urban.org](https://datacatalog.urban.org).
13. **Opportunity Atlas.** The Atlas is a collaboration between the US Census Bureau and Opportunity Insights at Harvard University. It provides policy and program leaders with the

latest evidence on economic mobility, helping them develop and test solutions to enhance economic outcomes in their communities: [www.opportunityatlas.org](http://www.opportunityatlas.org).

14. **Diversity Data Kids.** Diversity Data Kids produce child-focused equity data with tools to measure of segregation and opportunity, including the Child Opportunity Index and Policy Equity Assessments: [www.diversitydatakids.org](http://www.diversitydatakids.org).
15. **Eviction Lab.** Nationwide database of evictions, with details on rates, patterns, and demographics: [www.evictionlab.org](http://www.evictionlab.org).
16. **Prison Policy Initiative.** This platform provides comprehensive data and analysis on mass incarceration and criminal justice disparities, including incarceration rates, prison conditions, and the broader impacts of the criminal justice system on communities and families: [www.prisonpolicy.org/data](http://www.prisonpolicy.org/data).
17. **Economic Policy Institute State of Working America Data Library.** This resource includes a comprehensive database of educational opportunity and achievement data, including test scores, achievement gaps, and educational resources across school districts. [www.data.epi.org](http://www.data.epi.org).
18. **Urban Institute Upward Mobility.** Interactive dashboard with information on the factors that contribute to economic mobility across major metropolitan areas. The data includes education, family structure, residential segregation, income inequality, and social capital as predictors of upward mobility. [www.upward-mobility.urban.org/dashboard](http://www.upward-mobility.urban.org/dashboard).

## Sample Department-Level Response

The following is a sample department-level response. The sample is based on a fictitious department, however 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 used a table to display the sample content:

<p><b>Visualize:</b> Visioning process, lead with values and vision Articulate a clear, shared vision for advancing racial equity and social justice that is reflected in its mission, strategic goals, or leadership priorities</p>	<p><b>Please select the option that best describes the status of your department’s visualizing efforts.</b></p> <p>Please include your office or department’s racial equity vision/mission statement here. This can include a link to where it is located on your website, a finalized version if it is not publicly available, or the draft version. If your office or department has no racial equity vision/mission statement in either a finalized or draft form, please detail what efforts have been made in this area thus far (this can include initial research, brainstorming efforts, agenda setting, etc.). For those without a racial equity vision/mission statement or current plans to attempt to create one, please provide a detailed explanation as to why, including any barriers that have precluded you from doing so up until this point.</p>
	<div data-bbox="565 1146 1550 1339"> <ul style="list-style-type: none"> <li><input type="checkbox"/> Completed, resulting in a department racial equity vision and/or mission statement</li> <li>✓ In Process, with department and/or CORE team discussions and/or draft racial equity vision/mission statement underway</li> <li><input type="checkbox"/> Not yet started, with no process or plan in place for completing</li> </ul> </div> <p><b><u>Narrative Explanation</u></b></p> <p><i>Our department has a working draft of a racial equity vision statement. The Core team brainstormed several versions of the vision statement and workshopped it with representatives from each division. Below is the working version of our racial equity vision statement:</i></p> <p><i>“We envision a community that is healthy, resilient, and free from the burdens of systemic racism.”</i></p>

	<i>Our next step is to bring this version to senior leadership for discussion and adoption in early FY27. We will post the vision statement on our internal website and will include it on relevant public facing documents when appropriate.</i>
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<b>GARE Theory of Change</b>	<p>For each area of the GARE framework, please indicate your level of commitment, using existing and/or planned resources in FY27. You must substantiate your selection with evidence/supplemental information that supports your response in the explanation section.</p> <p><b>Note:</b> While not required, you're encouraged to reference your FY26 SWOT analysis and note any progress on the identified strengths and opportunities noted by ORESJ. Should you want to discuss new efforts underway, please share these as well.</p>
<p><b>Normalize:</b> Building awareness and shared understanding</p> <p>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</p>	<div> <input type="checkbox"/> Preliminary Commitment  <input type="checkbox"/> Commitment  <input checked="" type="checkbox"/> Strong Commitment </div> <p><b><u>Narrative explanation</u></b></p> <p><i>The department will engage in a Core team recruitment drive at the beginning of each fiscal year; during this time the Core team lead will have an opportunity to share its work during an all-staff meeting.</i></p> <p><i>The all-staff meeting will also be an opportunity to share the department's progress and goals for advancing racial equity and social justice. Taking time during an all-staff meeting to discuss Core team activities and recruitment is essential to continuing normalizing in the department.</i></p> <p><i>The department will continue to refine its RESJ on-boarding materials for new employees, which will help new employees learn about the department's commitments to RESJ along with the requirements of the RESJ Act.</i></p>

<p><b>Organize:</b> Creating systems, roles, and accountability structures</p> <p>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</p>	<div data-bbox="548 296 927 411"> <input type="checkbox"/> Preliminary Commitment  <input checked="" type="checkbox"/> Commitment  <input type="checkbox"/> Strong Commitment </div> <p><b><u>Narrative explanation</u></b></p> <p><i>In FY27, we will require division chiefs to identify and participate in an online GARE community group that focuses on the department’s area of work and/or a specific skill or tool that is relevant to their role. Division chiefs will report in senior management meetings relevant findings and updates from the field, which will help us stay informed about potential challenges and best practices relevant to our work.</i></p>
<p><b>Operationalize:</b></p> <p>Applying equity tools and measuring outcomes</p> <p>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</p>	<div data-bbox="548 968 927 1110"> <input checked="" type="checkbox"/> Preliminary Commitment  <input type="checkbox"/> Commitment  <input type="checkbox"/> Strong Commitment </div> <p><b><u>Narrative explanation</u></b></p> <p><i>With limited staff capacity, we will only be able to continue one of our operationalizing efforts begun in FY26—the data equity assessment. The contractor we are working with will deliver its findings report in March. We hope to seek additional grant funding to be able to use the information gleaned from this report to pilot a data project with three other offices to look at distribution of community programs by geography, race, ethnicity, age, and disability.</i></p> <p><i>When a key grant expires at the end of FY26, we will no longer be able to allocate specific resources for expansion of our workforce recruitment advertising and partnerships with local colleges to build a pipeline of future analysts.</i></p>



Select your department's main barrier or challenge to advancing racial equity and social justice.

- ☐ Resources (funding/staffing)
- ☒ Change Management
- ☐ Regulatory/Compliance
- ☐ External Factors (i.e. Federal funding requirements)
- ☐ Other

**Narrative Explanation**

*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 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 4 You Program – which was 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.

**Enhancement**

1. **(Required)** What is the purpose of this program (this may also be a service, initiative, or activity) and what is the enhancement you're requesting? 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, disability, socioeconomic status, location, etc..) 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, disability, socioeconomic status, location, etc..)

**The purpose of the Montgomery Connects program is to support the County's commitment to digital equity. The goal is for every resident and business to be part of our shared digital world. We work to achieve this by helping people to get access to computer devices, needed technology training, affordable home broadband services and subsidies, and public WiFi access points. We are requesting additional funding to support the renewal and expansion of the Computer 4 You Program. This will 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 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.**

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 does this program impact the people who are most negatively affected/harmed by the challenges this program seeks to address and how will the requested enhancement improve the program’s effectiveness in addressing those challenges? 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. The enhancement request will allow us to 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 implementation. How is that information reflected in the enhancement request?

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%).**

**These demographics are incorporated into our targeting approach and our recruitment of language liaison officers to enable culturally responsive communication.**

## How will the OBET responses be analyzed?

**ORESJ's analysis of department-level OBET responses will result in a Findings Statement, a numerical commitment rating, and a narrative justification.** In its analysis, ORESJ will review each department's self-selected commitment level, and supporting evidence, for each area of the GARE framework. Through its analysis of departments' narrative responses and supporting evidence, ORESJ may conclude that the department's self-selected rating is not substantiated. This may result in a commitment level rating that differs from the department's self-selected rating submission. ORESJ will communicate the findings from its analysis in a Findings Statement, which will describe the strength of a department's commitment based on their current and projected use of existing and requested FY27 resources. Accompanying the Findings Statement and numerical rating will be a narrative explanation summarizing ORESJ's observations and insights about the department. Barriers noted by the department will be reviewed and synthesized for patterns across departments but will not contribute to the department's overall commitment rating.

For program-level budgets, ORESJ's analysis and 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 request; and
- the strength of the connection between the budget request and the program's ability to advance racial equity and social justice in the County.

If a budget request demonstrates a strong likelihood to reduce and/or eliminate racial disparities and other inequities in the County, the response will receive a total score of 4. Like the department-level analysis, program-level ratings will be accompanied by a narrative explanation summarizing ORESJ's review.

ORESJ will provide the department-level Findings Statement and numerical commitment rating along with a program-level rating to departments, the Office of Management and Budget, the County Executive (in alignment with OMB's Operating Budget deliberation process), as well as the County Council. **ORESJ's analysis and ratings will not change once they are transmitted.** The information we provide 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 analysis—department and program-level rating—will be used as one of several criteria informing the County Executive's recommended FY27 Operating Budget.

## OBET Rubric

### Department-Level Findings Statement

Departments will receive a numerical commitment rating along with a narrative explanation based on ORESJ's analysis of their department-level response. The rubric for each level of commitment is below.

Assessment	Rating	Explanation
<b>Emergent Commitment</b>	3-5	<p>Department demonstrates an <b>“Emergent commitment to advancing racial equity and social justice”</b></p> <p>The department is in the early stages of building the capacity and infrastructure to advance racial equity and social justice. Foundational steps—such as initiating conversations, planning efforts, and securing initial buy-in from leadership, the community, and additional stakeholders—are underway, but dedicated resources and consistent actionable efforts are limited.</p>
<b>Sustained Commitment</b>	6-8	<p>Department demonstrates a <b>“Sustained commitment to advancing racial equity and social justice”</b></p> <p>The department is continuing existing initiatives that aim to sustain efforts to advance racial equity and social justice; however, there are no current plans for scaling, deepening, or evaluating the impact of such efforts.</p>
<b>Proactive and Strategic Commitment</b>	9-11	<p>Department demonstrates a <b>“Proactive and Strategic commitment to advancing racial equity and social justice”</b></p> <p>The department is engaged in strategies that not only maintain but strengthen and deepen efforts to advance racial equity and social justice. These include scaling successful initiatives, innovating, evaluating impact, and integrating</p>

		efforts more fully into departmental culture and systems.
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### Program-Level Rubric

Assessment	Rating	Explanation
<b>Does Not reduce and/or eliminate racial disparities and other inequities in Montgomery County</b>	0	The program request <u>as described</u> does not reduce and/or eliminate racial disparities and other inequities or advance equitable outcomes for members of the community.
<b>Unlikely to reduce and/or eliminate racial disparities and other inequities in Montgomery County</b>	1	The program request <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.
<b>Potential to reduce and/or eliminate racial disparities and other inequities in Montgomery County</b>	2	The program request <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.
<b>Likely to reduce and/or eliminate racial disparities and other inequities in Montgomery County</b>	3	The program request <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.

<b>Strong Likelihood to reduce and/or eliminate racial disparities and other inequities in Montgomery County</b>	4	There is a strong likelihood that the program request 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.
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### Program-level Narrative Justification

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 Assessment and Justification

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

### Sample Department-level Numerical Commitment Rating

Score	Narrative Justification
<b>7</b> Sustained commitment to advancing racial equity and social justice	<b>The department demonstrates a sustained commitment to advancing racial equity and social justice.</b> It has well-resourced, established and ongoing normalizing activities, including efforts to recruit Core team members, dissemination of RESJ specific onboarding materials, and all-staff information sharing sessions. In the area of organizing the department has allocated staff time towards RESJ specific professional development but is limited to no-cost options available through GARE. Expanding the department's operationalizing efforts are challenged by staff capacity and changes in the funding landscape, but some existing activities continue. The department does not yet have plans to scale or evaluate the impact of its RESJ efforts using FY27 resources.

### Sample Program-level Rating

Score	Narrative Justification
<b>4</b> Strong Likelihood to reduce and eliminate racial disparities and other inequities in Montgomery County	The program request, 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.

## 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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