INTEGRATING EQUITY ANALYSIS & BUDGET PROCESS

Montgomery County Government
Rockville, Maryland

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Legislation

- **Resolution 18-1095** adopted affirming the Council's commitment to creating a Racial Equity and Social Justice Policy Framework for Montgomery County (Adopted April 2018)

- **OLO Report 2018-8**, Racial Equity in Government Decision-Making: Lessons from the Field (September 2018)

Legislation

- **Racial Equity Training** for County Leadership (January 2019)

- **Racial Equity Training - Debrief** for County Leadership (February 2019)

- **Racial Equity and Social Justice Act** (November 2019)

- **Bill 27-19**, Administration – Human Rights – Office of Racial Equity and Social Justice – Racial Equity and Social Justice Committee Established (Enacted November 2019)

- **Office of Racial Equity** and Social Justice Established (December 2019)

Legislation

- **Chief Equity Officer** appointment confirmed (February 2020)

- **Bill 44-20**, Racial Equity and Social Justice – Impact Statements – Advisory Committee Amendments (Enacted December 2020)

Implementation

- **Role of Office of Racial Equity and Social Justice**
  - Training and Facilitation
  - Provide Technical Assistance
  - Provide Opportunities for departments to share processes and remedies
  - Report annually on challenges and successes

Applying a Racial Equity Lens - Incremental Steps

- **FY21 Operating Budget Development Process**
  - Provided a definition of equity
  - Departments asked - How does this program promote equity?
  - Departments encouraged to consider equity from various perspectives: racial, ethnic, socio-economic, linguistic, gender, age, disability, etc.
  - Departments mapped their programs to the County Executive's Initial Seven Priority Outcomes and/or 21 key indicators

Applying a Racial Equity Lens - Incremental Steps

- **FY22 Operating Budget Development Process**

    - Office of Management and Budget dedicated a section of the program proposal form to racial equity

    - Partnered with the new Chief Equity Officer/Office of Racial Equity and Social Justice

    - Integrate racial equity into department program proposals (budget requests) at the earliest possible phase of the budget process

Applying a Racial Equity Lens - Incremental Steps

- **FY22 Operating Budget Development Process *(continued)***

  - Provided a definition of equity, racial equity, equality, and social justice in guidance documents

  - Included guiding questions in the form:

    - ➢ Does your department use quantitative and qualitative data to track program access and/or service outcomes for different population groups?

    - ➢ Which community residents will potentially benefit the most from your program proposal or be burdened by your program proposal?

    - ➢ How does the program promote racial equity?

Applying a Racial Equity Lens - Incremental Steps

- **FY23 Operating Budget Development Process**

  - Expand the development of a Budget Equity Tool

    - Refine existing guidance documents

    - Refine existing guiding questions

    - Include additional guiding questions

  - Provide a glossary of definitions related to equity

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Applying a Racial Equity Lens - Incremental Steps

- **FY22 Capital Budget/Capital Improvements Program Development Process**

  - Used equity data for use in FY22 Full CIP decision making related to project increases, reductions, deferrals

  - Collected data from

    - Maryland-National Park and Planning Commission

    - Metropolitan Washington Council of Governments (COG)

    - Montgomery County Public Schools (MCPS)

  - Utilized Geographic Information Systems (GIS)
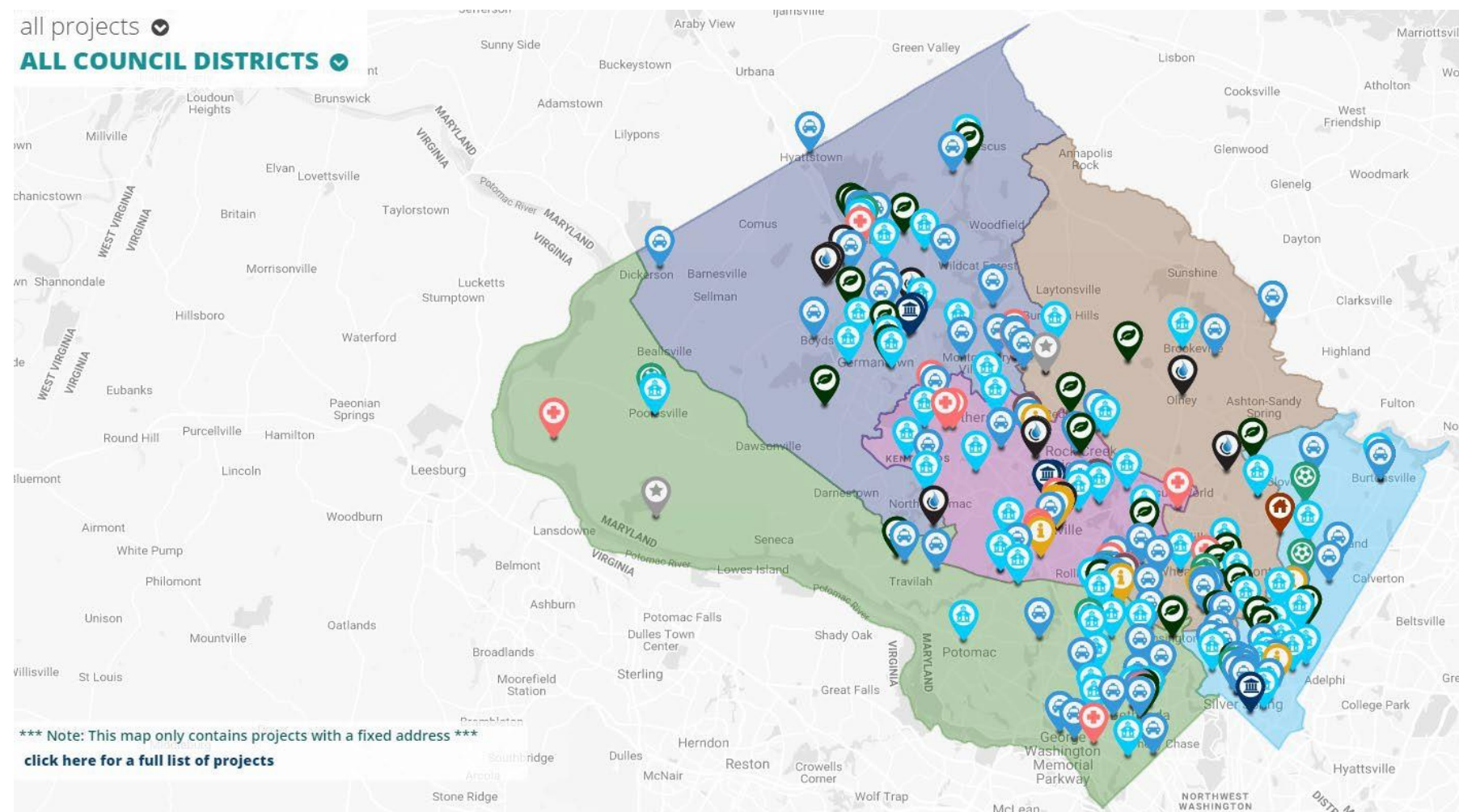
Applying a Racial Equity Lens - Incremental Steps

- **FY22 Capital Budget/Capital Improvements Program Development Process *(continued)***
  - Created mapping tools and reports on a combined dataset with CIP Projects
    - MCPS' FARMS (Free and Reduced-Price Meals) and Ethnicity
    - Projects by 2018 Median Household Income
    - Projects by COG Equity Emphasis Area Census Tracts/Maps of CIP projects
    - Montgomery County's Census Tracts by COG Equity Emphasis Area & Ratio of Concentration (Regional & County Level)
  - Required departments to submit information about racial equity considerations when requesting FY22 CIP amendments
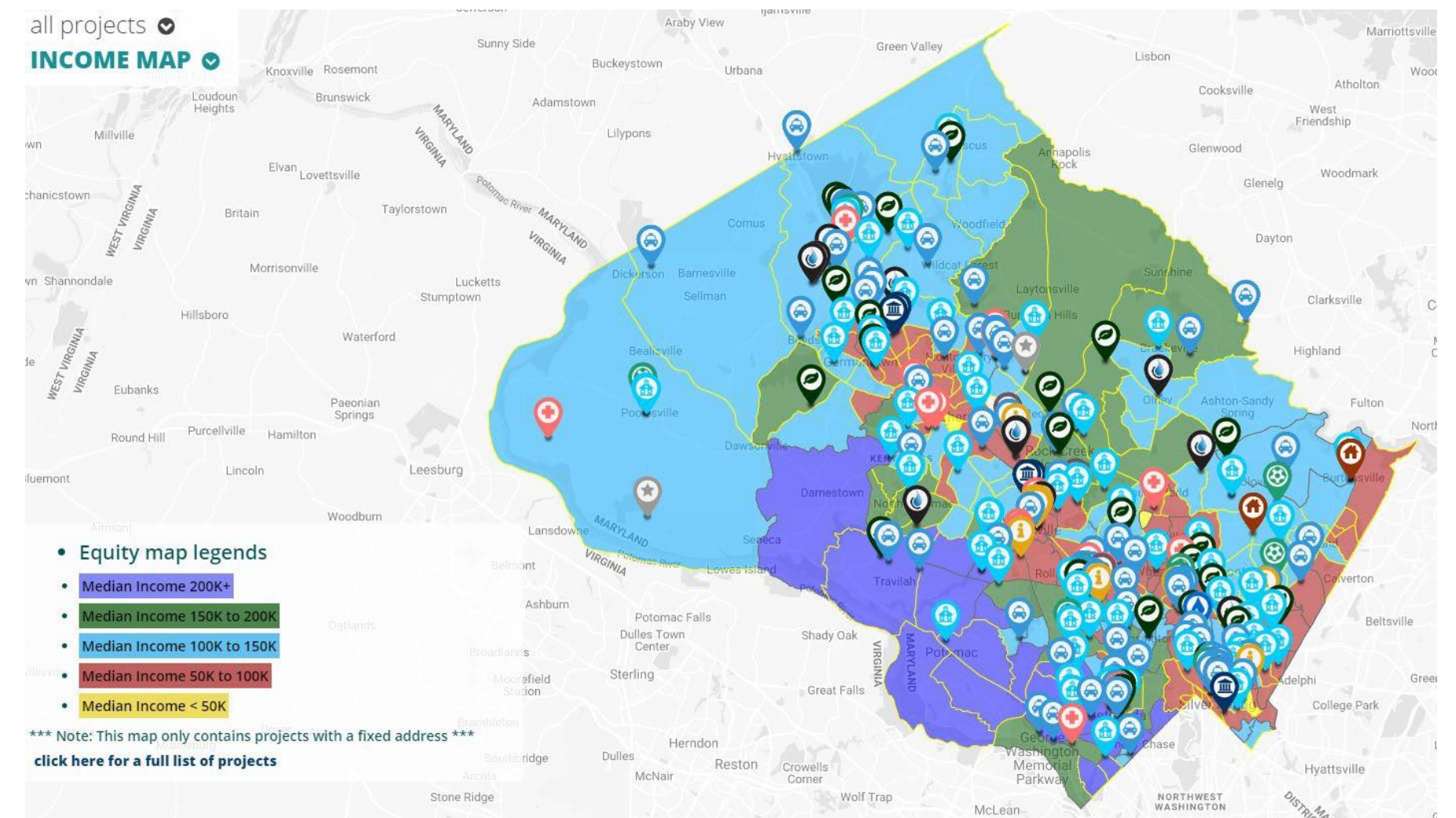
Applying a Racial Equity Lens - Incremental Steps

- **FY23 Capital Budget/Capital Improvements Program Development Process**

  - Pre-screening Process – integrate refined equity assessment

    - Ongoing/Maintenance Projects (LOE)

    - Stand Alone Projects

  - Expand the development of a Budget Equity Tool

  - Expand analysis to include all projects (including project not under construction)

  - Include review of department prioritization of subprojects

  - Provide a glossary of a definitions related to equity

Capital Budget – Geographic Analysis

FY22 Approved CIP Projects County Wide

FY22 Approved CIP Projects & Median Income

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

Forward Momentum

Operating Budget & Capital Budgets

- Expand Development - Budget Equity Tool
  - Deeper Dive Questions (qualitative and quantitative data)
    - Who benefits?
    - Who is burdened?
    - Who is missing?
    - How do we know?
      - Data? Disaggregate data?
      - Community Outreach?
    - What can/did we do? What strategies do we need to develop to advance equity?
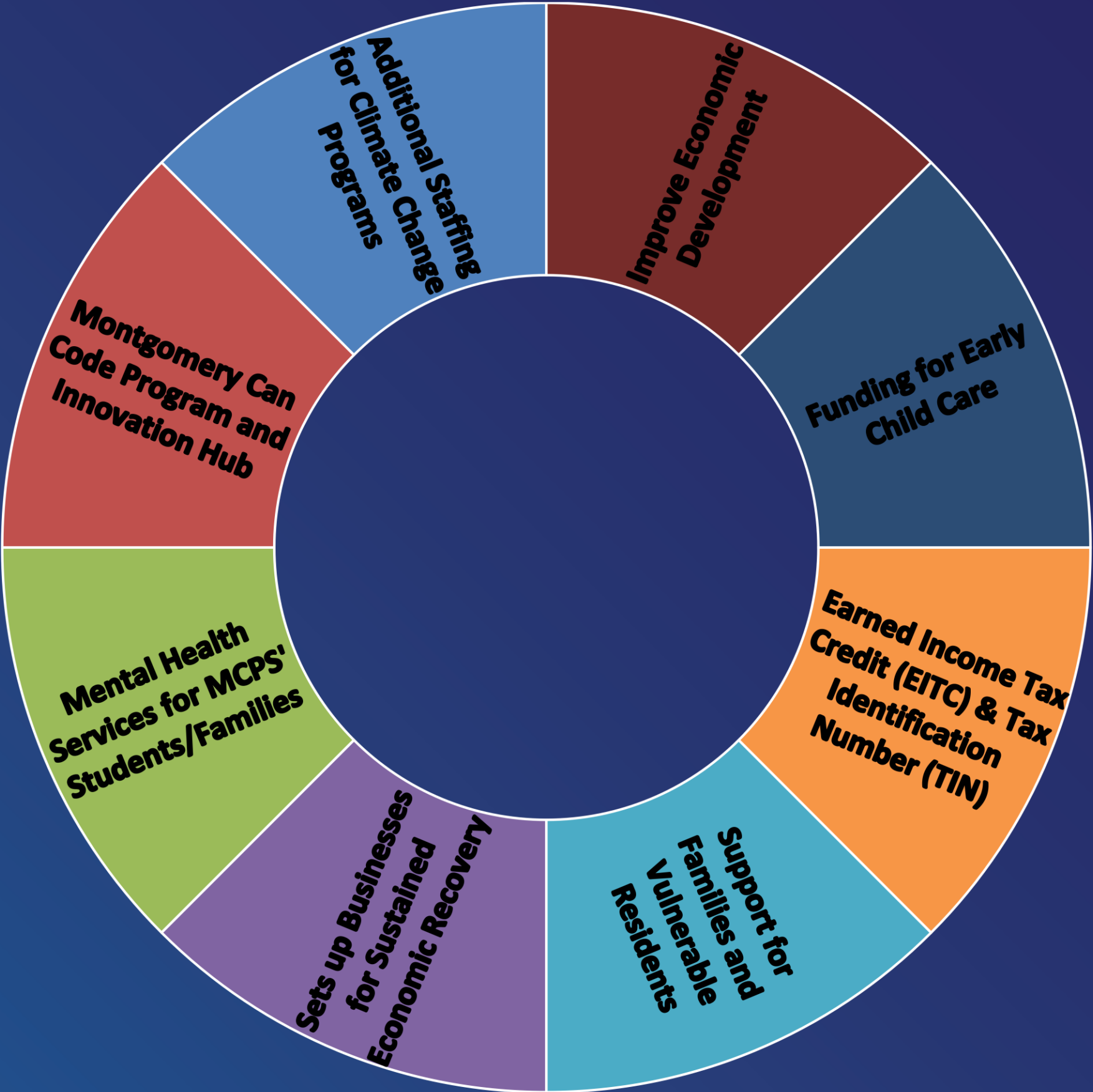
A More Equitable County

FY22 Approved Operating Budget & Capital Budgets

- Additional Resources and Personnel for the Office of Racial Equity and Social Justice

- Funds for a Mobile Health Clinic to Address Health Disparities

- Creation of a Multilingual and Multicultural Communications Unit

- Funds to Close the Digital Divide

- Fund Study to Reimagine Ride On Transit Network

- Advance Bus Rapid Transit Projects

- Fund health and service centers at schools with large concentrations of minority and low-income students

A More Equitable County

FY22 Approved Operating Budget & Capital Budgets

- Additional Staffing for Climate Change Programs
- Improve Economic Development
- Funding for Early Child Care
- Earned Income Tax Credit (EITC) & Tax Identification Number (TIN)
- Support for Families and Vulnerable Residents
- Sets up Businesses for Sustained Economic Recovery
- Mental Health Services for MCPS' Students/Families
- Montgomery Can Code Program and Innovation Hub
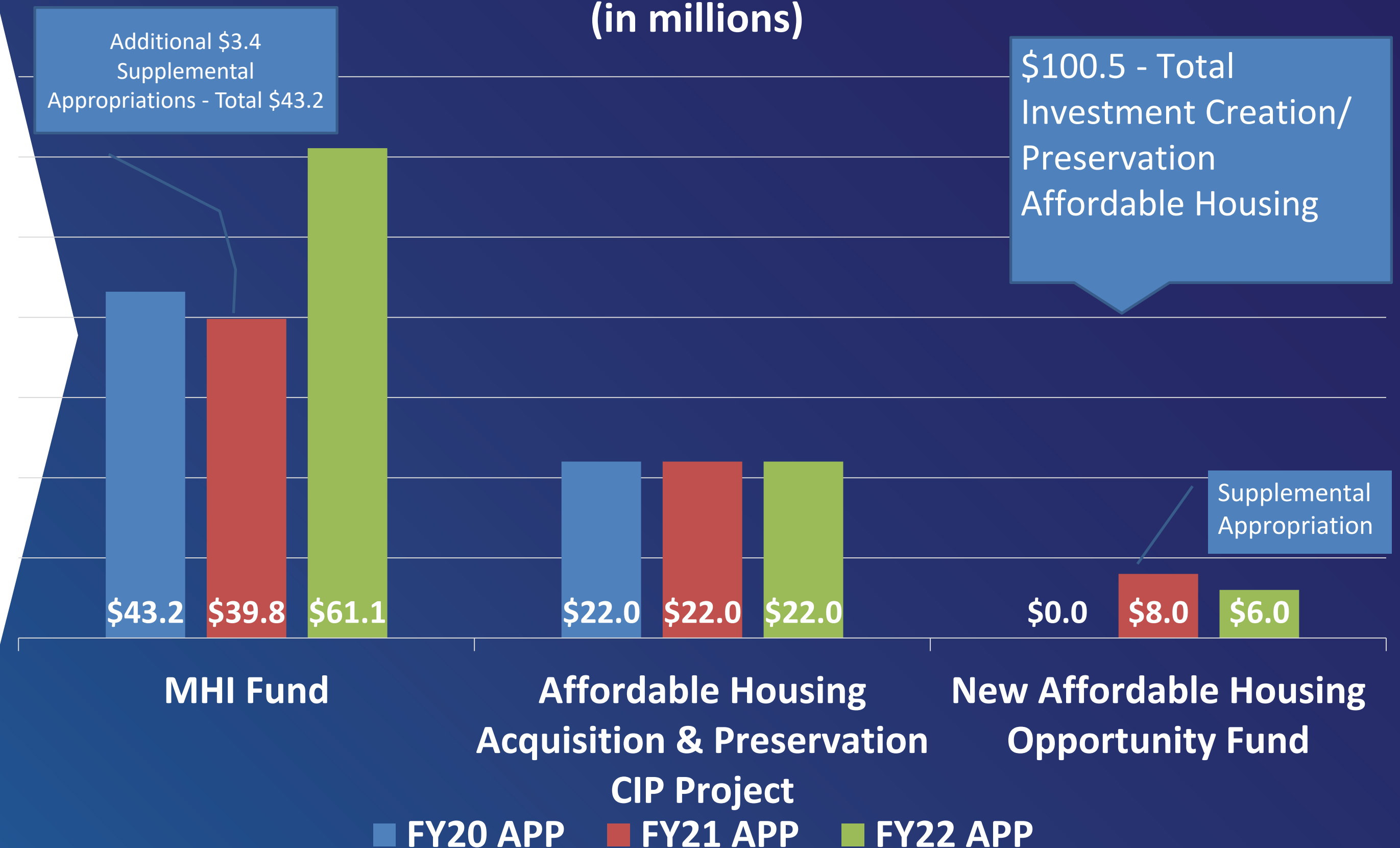
A More Equitable County

FY22 Approved Operating Budget & Capital Budgets
Funding for Affordable Housing
(in millions)

Additional $3.4 Supplemental Appropriations - Total $43.2

$100.5 - Total Investment Creation/ Preservation Affordable Housing

Supplemental Appropriation

	MHI Fund	Affordable Housing Acquisition & Preservation CIP Project	New Affordable Housing Opportunity Fund
FY20 APP	$43.2	$22.0	$0.0
FY21 APP	$39.8	$22.0	$8.0
FY22 APP	$61.1	$22.0	$6.0

■ FY20 APP   ■ FY21 APP   ■ FY22 APP

Questions?

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

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