
Racial Equity Budget Tool

February 12, 2021
FY22 Council Budget Retreat

Overview

- **Racial Equity Budget Tool**
 - What is a racial equity tool and why it's important
 - History of the City's equity work
 - Development of the tool
 - Incorporating equity in the FY22 budget process

 - **Budget Engagement**
 - Overview of recent educational outreach efforts
 - Future engagement plans
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What Is a Racial Equity Tool?

- A **racial equity tool** is a decision making model used to integrate equitable considerations into policies, processes, procedures and practices.
- Requires purposeful consideration of race, focuses on data, and encourages community input and involvement.

Racial Equity Tool
FY 2022

DEPARTMENT	REQUEST NAME
REQUEST DESCRIPTION (Provide 1-2 sentences below.)	
Was this item submitted as a budget pre-list request? Y / N	
Is this request one-time or recurring in nature? One-time / Recurring	
Is this initiative related to the Strategic Plan or has it been presented at OSAP? Y / N	
Is this request a new program or an expansion of an existing program? New / Expansion	
OUTCOMES • What specific results/outcomes are intended for the Durham community?	
DEMOGRAPHICS • Which neighborhoods, geographic areas, target populations and/or employees would this request impact? • What is the race/ethnicity and income level of those impacted? What data can you provide to support this?	
BENEFIT / BURDEN • Who do you expect would benefit most from this request? • Who would be burdened?	

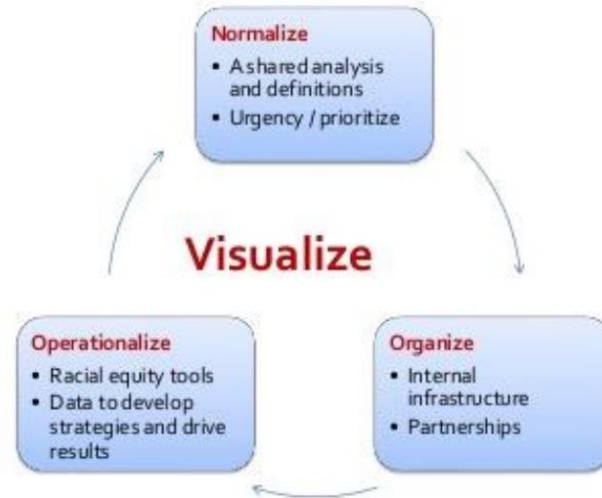
Why Use a Racial Equity Tool?

The **racial equity budget tool** is BMS' contribution to help the city operationalize our Racial Equity mission statement:

“The City of Durham intentionally identifies racial inequities, engages the community and uses a collaborative approach in creating solutions to ensure race no longer stands as a determinant of outcomes and opportunities.”

GARE model for embedding racial equity in organizations

National effective practice



How We Got Here:

City of Durham Racial Equity Team

Tools and Training Team

The Budget racial equity tool stemmed from the work of our first organizational racial equity team, in our tools and training sub-team.

Team Members

- Sharon Williams, Equity and Inclusion
 - Michael Pullum, Community Development
 - Adria Graham-Scott, OEWD
 - Henry Burwell, Police Department
 - Erin Parish, BMS
 - Mary Grace Stoneking, intern
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Learning and Building from Others

Comparative Research of Municipalities

- Examined tools and supporting materials
- Conducted interviews with municipalities

Technical Assistance

- We received training and support from GARE as part of our year-long development cohort with included 7 other municipalities and organizations in North Carolina
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Lessons from Other Cities

Cities We Examined

- Seattle
- Grand Rapids
- San Antonio
- Minneapolis
- Portland

Uses for Equity Tools

- Budgeting
 - Policy Decisions
 - Programming Decisions
 - Approaches to Covid-19 Responses
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How Do I Use This Toolkit?

With Inclusion. The analysis should be completed by people with different racial perspectives.

Step by step. The Racial Equity Analysis is made up of six steps from beginning to completion:

Step 1. Set Outcomes.

Leadership communicates key community outcomes for racial equity to guide analysis.

Step 2. Involve Stakeholders + Analyze Data.

Gather information from community and staff on how the issue benefits or burdens the community in terms of racial equity.

Step 3. Determine Benefit and/or Burden.

Analyze issue for impacts and alignment with racial equity outcomes.

Step 4. Advance Opportunity or Minimize Harm.

Develop strategies to create greater racial equity or minimize unintended consequences.

Step 5. Evaluate. Raise Racial Awareness. Be Accountable.

Track impacts on communities of color overtime. Continue to communicate with and involve stakeholders. Document unresolved issues.

Step 6. Report Back.

Share information learned from analysis and unresolved issue with Department Leadership and Change Team.

What we
learned:
Seattle as a
national
model

What we learned:

Grand Rapids as a Model

- 2018: Completed a Racial Equity Plan
- 2019: Every department chose a project to pilot using a racial equity tool
 - Opportunity areas such as education, environment, criminal justice, housing and jobs
 - Impact areas such as construction equity, inclusive outreach, workforce equity and youth initiatives
 - Neighborhoods experiencing highest level of inequities were designated as geographic focus areas
 - Departments provided training and manual explaining context and how to use the tool

What we learned

Grand Rapids as a Model

- **2019: City developed Strategic Plan with an equity statement and equity as the first named value along with specific ways for working towards equity and measuring progress.**
 - **2020-2021: Official mandate for equity tool to be woven into Budget process tied to Strategic Plan.**
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Common aspects of racial equity tool processes

- Started slow with phased roll-outs
 - Analysis focused on key impact areas for racial equity
 - Needed a leadership mandate for real success
 - Racial equity teams (often multi-departmental) provided support to departments:
 - Training on the tool and process before starting
 - How-to manual provided with supplementary resources including glossary of key terms and data and engagement resources
 - One-on-one consultations were available to departments while working on the process of completing the tool
 - Evaluation of how well the tool was filled out afterwards
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Sharing Our Learnings

Meeting with BMS

- This fall, the racial equity tools and training team shared our learnings with Budget and Management Services staff about national best practices for developing and using a racial equity tool.
 - Shared a recommended model for what an equity tool should include.
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Equity Tool Goals and Team

Racial Equity Tool Goals

- Provide deeper analysis for select budget requests from a racial equity lens.
- Help departments critically think about their role in advancing racial equity.
- Support City leadership's decision making process.

Team Members

- Erin Parish
 - Toney Thompson
 - Christina Riordan
 - Lindsey Bineau
 - Robin Baker
 - Shannon Delaney
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Equity Tool Sections

- **Outcomes**

- What specific results/outcomes are intended for the community if implemented?

- **Demographics**

- Which neighborhoods, geographic areas, target populations, or employees would your request impact?
- What is the race, ethnicity and income breakdown of those impacted? What data do you have to support this?

- **Benefit/Burden**

- Who do you expect would benefit most from this request if implemented?
 - Who would be burdened?
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Equity Tool Sections

- **Minimize Harm**

- What are the potential unintended consequences of this request?
- What can be done to mitigate these unintended consequences?

- **Community Engagement**

- Have you involved relevant community members and stakeholders in creating this request?
- Going forward, how do you plan to include voice of those most impacted/burdened?

- **Accountability**

- How will you share results with your department and City leadership?
 - How will you share results with community members and stakeholders?
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Equity Analysis Support

Additional Resources for
Departments

- Manual on how to perform equity analysis and complete tool
 - Training sessions for departments
 - Curated data sources
 - Key city staff for assistance
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Keys to a Successful Equity Analysis

- Racially disaggregated data is used to support analysis.
 - Equitable community engagement framework is used to inform budget requests.
 - Leverage other departments and community stakeholders for support.
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Process for Using Equity Tool

- Equity criteria were given to departments to identify budget requests that had an equity focus.
 - Requests with the strongest equity focus were selected for analysis using equity tool.
 - 8 requests totalling \$5,600,074
 - Departments provided additional time to submit budget requests that required analysis using equity tool.
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Equity Tool Process Continued

- For FY22 development, departments were asked to submit budget reduction plans.
 - Asked departments to submit a modified equity tool to assess proposed reduction plans.
 - Equity analysis will be used to help City staff make prioritization decisions to inform the City Manager's proposed FY22 budget.
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Next Steps

Internal team will review submitted requests and provide relevant feedback and recommendations to BMS leadership for FY22 process.

BMS staff will incorporate equity analysis of reduction plans into decision-making process.

Evaluate equity tool process and completed analyses to implement improvements for future budget cycles.

Questions?

Budget Engagement

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Spring 2020 Budget Academy

Budget Simulation Exercise

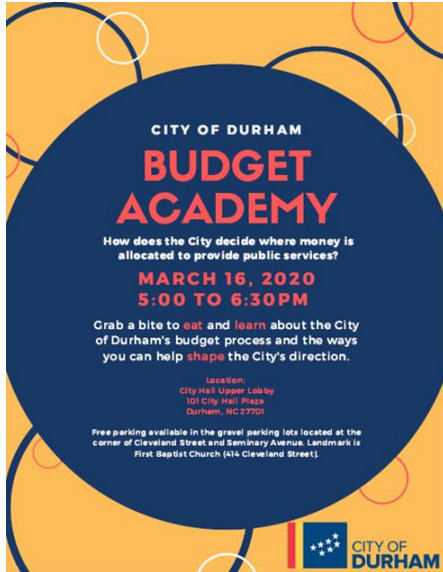
How budget process works (game)

Tabling with Other Departments

Opportunities for residents to get involved (PB, NIS, Clerk)

Education around Budget Guidelines

Explanatory one-pager and analysts tabling



Spring 2020 Budget Academy

CANCELLED

Budget Simulation Exercise

How budget process works (game)

Talking with Other Departments

Opportunities for residents to get involved (PB, NIS, Clerk)

Education around Budget Guidelines

Explanatory one-pager and analysts' briefing

Fall 2020 Education Outreach

Develop and Share Educational Resources

Provide residents baseline knowledge for future engagement

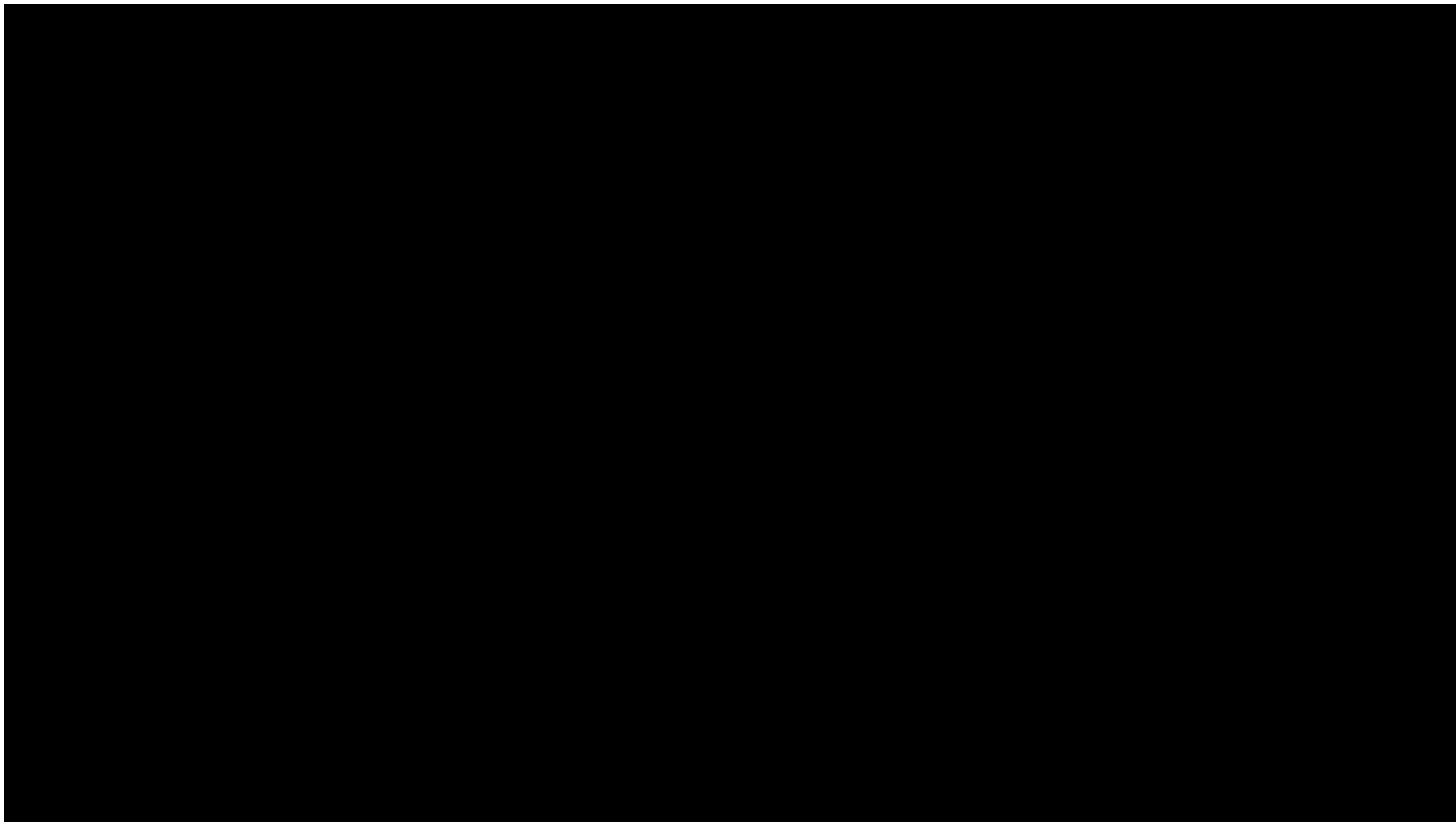
Two Videos

[“What is a Budget”](#) and [“Budget Development Timeline”](#)

Promote on Social Media and Website

Office of Public Affairs promoted and BMS posted to website





Spring 2021 Education Outreach

Virtual “Budget Academy” Event for Durham CAN

Showing educational videos and doing budget simulation

Communicating Best Time for Resident Input

Fall provides the City with sufficient time to consider resident input for upcoming budget process

Providing Information on Continued Involvement

Sharing resources so residents can stay informed, get involved (join Board/Commission/Committee, speak at Council Meeting)

Fall 2021 Engagement Planning

Flexible Virtual or In-Person Session

Optimistically in-person but... COVID

Building on What We've Learned

Opportunity to learn from PB's spring engagement (Social PinPoint)

Continuing Education Efforts, Soliciting Input

Adding to education by soliciting feedback from residents on budget and strategic priorities

Questions?
