Budget Equity Tool Overview

Step One: Results & Outcomes
What are the intended results (in the community) and outcomes (within the organization)?

Tips:
-Think about the impact of specific groups. (children, youth, seniors, people of color)
-Do you know your community's input or demographic information? If not, reference the section on Community Engagement.

Step Two: Data Analysis
-What data do you have and what does it indicate? Who is served or impacted by this policy or program?
-What data do you have about existing inequities that should be considered?
-What data is missing and how could you access it?

Step Three: Strategic Engagement
-Who needs to be engaged in the decision-making?

Tips:
-Identify Engagement strategies to gather public/stakeholder input.
-For decision maker engagement, utilize the Common Approach to heighten awareness and articulate benefits.

Step Four: Benefits & Burdens
-Who will benefit and who is burdened by this proposal?
-Does the project or policy align with desired outcomes from Step One?

Step Five: Implementation Plan
-Is the plan *realistic?*
      -fully funded
      -staff resources
      -implementation and enforcement

Step Six: Communication & Accountability
-Is the project/program/policy meeting the desired outcome and results?

Budget Equity Tool

Project and/or Policy Name:

Brief Description:

<u>Step One: Desired Results & Outcomes</u>

Intended Results (Community)	
Desired Outcomes (Agency)	

<u>Step Two: Data Analysis</u>

Data	Source	What It Says
Community Feedback	Ex. Public Comment at Meetings	
Portion of the Underserved Population	Ex. Census Data	

What data is missing?

Data	Potential Sources	What It Would Tell Us
Ex. People 55+ at FPL		

Step Three: Strategic Engagement

Strategic Engagement Plan

Questions to Consider
(Community Members & Stakeholders)

What voices are underrepresented in your community or organization?	
What is your plan for engaging those voices?	
What are the barriers to participation?	
Who can you enlist to help in spreading the word about engagement?	

Tiers of Engagement

Goal	Method of Outreach	Schedule or Frequency	Information Needed Or Shared
Inform			
Consult			
Involve			
Collaborate			
Empower			
Other			

Step Four: Benefits & Burdens

Who benefits?	Does this align with intended outcomes? Other considerations?

Who is burdened?	Strategy to eliminate negative impact?

Community Resources & Relationships

Name/Organization	Contact Information

Step Five: Implementation

	Yes	No
Is this project/program/policy realistic?		
Is this project/program/policy adequately funded?		
Is this project/program/policy adequately staffed?		
Are there mechanisms to check accountability/outcomes?		
Is there leadership and elected official support for this?		
Have impacts and outcomes been considered?		
Was community engagement a step in the planning process?		
Will this project/program/policy contribute to more equity in the community?		

Step Six: Communication & Accountability

Is the project/program/policy meeting the desired outcome and results? Have regular check-ins with your stakeholders to ensure the process is working. Do not be afraid to make adjustments!

Resources & References

City Equity Offices in America:
http://www.citymayors.com/society/usa-city-equity-offices-list.html

Groundwork USA:

https://groundworkusa.org/eqdevtools/best-practices-community-engagement/

Institute for Local Governments: Public Engagement in Budgeting Handout:

https://www.ca-ilg.org/sites/main/files/file-attachments/public_engagement_in_budgeting.pdf?1488836941

City of Oakland DRE. Oakland Equity indicators:

https://s3-us-west-1.amazonaws.com/beta.oaklandca.gov/pdfs/2018-Equity-Indicators-Full-Report.pdf

City of Oakland DRE: 2019-2020 Accomplishment Report:

https://cao-94612.s3.amazonaws.com/documents/2019-2020-Accomplishmnet-Report_5-28-21-8-31-2022.pdf

PolicyLink's The Community Engagement Guide for The Sustainable Communities Initiative:

https://www.policylink.org/resources-tools/community-engagement-guide-for-sustainable-communities

San Francisco Racial & Social Equity Action Plan:

https://sfplanning.org/project/racial-and-social-equity-action-plan

Urban Institute: Community Voice and Community Voice and Power Sharing Guidebook:

https://www.urban.org/research/publication/community-voice-and-power-sharing-guidebook

Western City: Engaging Your Community in the Budgeting Process:

https://www.westerncity.com/article/engaging-your-community-budgeting-process

http://www.citymayors.com/society/usa-city-equity-offices-list.html