

Budgeting for Equity FY 24-25

Overview

Budgeting is an annual decision-making process about resource allocation and, by extension, a City priority. Budgeting for Equity (BfE) is both a process and tool. The BfE **process** is a series of guided questions that require departments to analyze their budget proposals with a lens towards enhancing services to those that may need it the most. The worksheet is a **tool** that documents department efforts to advance equity, supported with data and analysis that is evaluated over time.

Race continues to be the leading indicator of life outcomes. Thus, centering a budget proposal with a framework of race and equity will help the city take a meaningful step towards improving the conditions of well-being for the people most impacted by structural and institutional racism.

Directions:

Departments are directed to intentionally embed equity as a strategy for the development of their budget proposal package and the planned use of existing resources for next year.

- Choose and submit two (2) worksheets on 2 core services or programs**
- The chosen core services/programs should have: (a) a general understanding about racially disaggregated data, (b) have access or a plan to access data in supporting the worksheet questions
- Submit BfE Worksheets (pdf) by **January 26, 2024** via [Sharepoint](#)
- Schedule time with ORE for feedback, questions, and technical assistance: Officeofracialequity@sanjoseca.gov

Timeline and Submittal Process:

Milestone	Dates
1:1 ORE with Departments review FY 23-24 Submission	August-September
Townhall: Learn about any BfE updates, forum for questions and answers <i>Audience:</i> Administrative Officers, Budget Analysts who are familiar with the BfE process	October 19, 10:00-10:45AM
Workshop: Learn best practices and how to complete the BfE worksheet	October 26, 10:00 – 11:30 AM

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	<i>Audience:</i> Staff who are NEW to the BfE process and/or would like to know keep fresh of best practices	
	Open Office Hours with ORE	Sept-January 25, 2024
	Departments submit BfE worksheet and ORE scores	Jan-February 2024
<i>Recommended Working Timeline for Departments:</i>		
1.	Meet with identified staff that will be involved with budgeting and ensure staff are aware of BfE process and expectations	By Sept 29
2.	Attend townhall and workshop	October
3.	Agree on 2 chosen core services/programs for BfE submittal	October
4.	Draft initial BfE worksheets with team	November
5.	Engage and schedule time with ORE for feedback and guidance	December-January
6.	Submit BfE Worksheets via Sharepoint	January 29, 2024

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Pro Tips:

- ✓ Review last year's BfE worksheet submission and consider opportunities to improve upon
- ✓ Review the BfE scorecard and definitions
- ✓ Use disaggregated data wherever possible
- ✓ Even if you do not have access to data, explain why and how you plan to collect any future data
- ✓ Use performance measures to assess progress - how much, how well, and is anyone better off because of this budget proposal?
- ✓ Consider historical factors and investigate root causes of why demographics are not doing as well as others.
- ✓ **Focus on progress, not perfection.** Equity practices are constantly growing and evolving.

Resources (Links)

- [Repository of BfE Materials](#)
- [San Jose Equity Atlas](#)
- [Demographic Explorer](#)
- [San Jose Neighborhood Demographics Map](#)
- [Bay Area Equity Atlas](#)
- [Diversity in San Jose |](#)
- [Equity Priority Communities](#)
- [Office of Racial Equity Glossary and Terms](#)
- [Office of Racial Equity Training and Resources](#)
- [BfE Scorecard](#)



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Frequently Used Terms:

- **Disaggregated Data:** Refers to data that has been broken down into specific sub categories such as race/ethnicity, gender, and/or age to understand underlying data trends.
Example: Historically, we understand that there has been a pay gap between men and women in the United States. While women earn 82 cents for every dollar earned by men in 2022, there are even further wage gaps in the Latinx community, with Latinas earning only 57 cents for every dollar earned by white, non-Hispanic men.
- **Qualitative Data:** Data driven by qualities and characteristics. Collected themes using questionnaires, interviews, and observations and is typically presented in narrative forms.
Example: Themes and narrative sharing of black single mothers sharing their experiences when applying for housing to illustrate lived experiences of housing discrimination.
- **Quantitative Data:** Data collected to illustrate the “how many” aspects of research questions. This data can be counted or compared numerically. This data is typically gathered using surveys, rating scales, or numerical instruments (thermometers for weather, measuring tape for lengths, etc.).
Example: 74% of the City of San Jose identifies as being a person of color.
- **Institutional Racism:** refers specifically to the ways in which institutional policies and practices create different outcomes for different racial groups. The institutional policies may never mention any racial group, but their effect is to create advantages for whites and oppression and disadvantage for people of color.
Example: Government policies, known as red lining. Red lining is a discriminatory practice where banks and loan servicers limited lending to low-income and people of color only to neighborhoods that were deemed as “hazardous” and “declining.”
- **Intersectionality:** A term coined by Black lawyer and scholar Kimberlé Williams Crenshaw, to describe how race, class, gender, age, and other aspects of identity intersect and inform the experience of individuals or groups of people. It takes into account’s peoples multiple identities and experiences and the complexity of the discrimination and prejudice they face.
Example: A White Lesbian woman may experience discrimination based on her sexual identity; a Black Transgender woman will experience significantly different levels of discrimination based on her combined identities despite sharing an identity of LGBTQIA+ with her White counterpart.

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Budgeting for Equity Worksheet

Department: Office of the City Attorney

Department Contact: Kim Jackson

Reviewed/Approved by: Click or tap here to enter text. (Director Signature)

Date Click or tap to enter a date. **January 26, 2024**

Is this tied to a budget proposal? If so, what #: BR01

Core Service Area/Program: Transactional and Litigation (PE01 and PE02)

Equity Lens-Budgeting at a Glance

Questions 1 & 2:

- These questions provide an assessment of data that departments have at their disposal and asks how disaggregated data informed the proposal package.

Questions 3-5:

- These questions offer each department an opportunity to assess their specific budget development process for the chosen division and/or program and consider potential benefits to communities of color and low-income communities.

Be Data Informed

1. How does disaggregated data and any of the corresponding analysis inform the proposal package? What was the source and type of data (e.g. quantitative or qualitative) did you use to analyze and develop the proposal?

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2. Moving forward, what (if any) disaggregated data will you collect and track to help understand how outcomes will affect people of color or other vulnerable communities?

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Assess Impact

3. Is there a larger than average population of people of color and/or low-income communities in these areas? How will the implementation of your proposed budget items positively or negatively impact communities of color?

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4. What do you believe are the root causes or factors creating any racial or social inequities identified in the data?

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5. What explicit steps will be taken in FY 2024-2025 to focus existing resources to advance equity? (e.g. staffing allocation shifts for the purposes of advancing equity, diversity, and inclusion; equity groups or trainings that are happening in the Department; and/or programmatic commitments that are intended to reduce or eliminate disparities experienced by communities of color and low-income communities.)

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