Revised August 2023

COUNTY OF MONTEREY

BUDGET EQUITY TOOL

Fiscal Year 2024 - 2025

Contact the Civil Rights Office with any questions:
civilrights@co.monterey.ca.us

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The Budget Equity Tool

Monterey County's Budget Equity Tool was inspired by local government entities nationwide. A Budget Equity Tool includes a set of questions to help departments examine to what extent budgetary decisions align with advancing the county's commitments to equity.

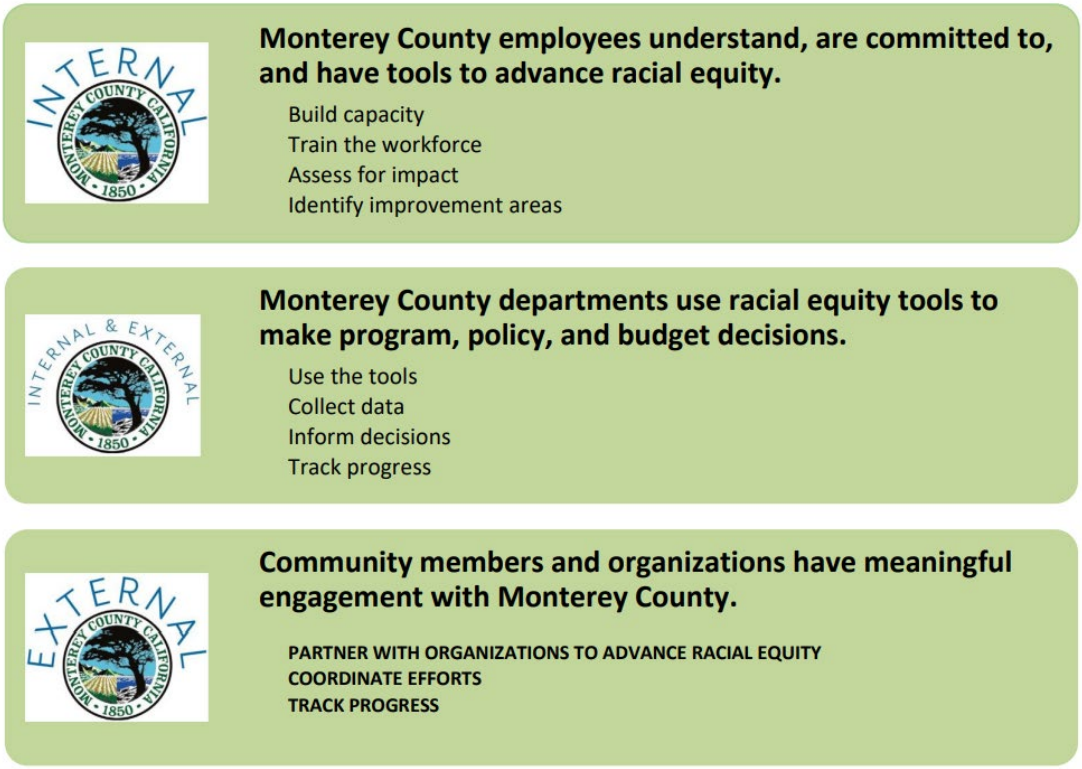
The Civil Rights Office is available to answer any questions or provide support while a department works through answering the questions.

Equity in Monterey County

In 2017, the Board of Supervisors adopted a Racial Equity Statement that reads:

> For many, Monterey County is a great place to live, work, play and learn, yet many experience deep and persistent inequities, especially by place and race, that threaten prosperity. Current times call for strengthening of our efforts to understand, respect and celebrate the diverse experiences and realities of all those we work with and serve. We now renew our efforts to ensure those who are disproportionately impacted by racial inequities, whether by our own actions or inactions, are guaranteed equitable solutions. This will include both revision and creation of programs and policies that are data-driven, community-informed, transparent, accountable, and sustainable. In this way, we will ensure that the people who live in Monterey County, will have opportunity for advancement and contribution regardless of where they live, how much money they make, or the color of their skin, and can lead healthy, fulfilling, and productive lives.

The Budget Equity Tool will be a piece of the Monterey County Racial Equity Plan that lays out internal and external strategies.



TIER 1: INTERNAL

Tip: When filling this out, it may be helpful to refer to your department or team's Equal Opportunity Plan and Title VI resources.

1. What persistent funding gaps or limitations in your overall budget could inhibit your department's ability to advance racial and economic equity?
    - This can include funding limitations outside the department's control, time constraints, or recognition that current funding is inadequate to address the extent and impact of racial and economic disparities.

   The Department of Social Services (DSS, Department) is aware of the following limitations to our overall budget:

   1. The Department does not have CalFresh and Medi-Cal administrative funds that are specifically allocated for outreach.

   2. Choices to contract with interpreters is limited to those approved by contracts and purchasing. Smaller vendors are unable to meet the stringent County insurance coverage requirements. Thus, there is a lack of specialized translators in indigenous languages to meet the need.

   3. State allocations for In-Home Supportive Services (IHSS) does not match the staffing need.

2. Describe what strategies your department recommends to reduce the impact of barriers to or changes in services for low-income and communities of color.
    - Examples could include services to improve or ensure access, such as transportation or translation and interpretation services.

   DSS recommends/is working to implement the following strategies:

   1. Allow for the procurement of translation services through a less formal procurement process without the stringent insurance need requirements.

   2. Setting up proctored self service stations in the Community Benefits (CB) lobby.

   3. Building mobile outreach vehicles to provide offsite services to difficult to reach communities that are economically disadvantaged.

   4. Continue to provide reunification housing services to economically disadvantaged Family Children Services (FCS) clients.

   5. Continue to fund homeless and housing services in the community.

3. What specific programs, policies, practices, and structures within your overall budget and improvement requests can address historical and recent racial and economic inequity?
    - Think about some of the inequities in Monterey County that your department might see in the form of a barrier or gap in services. This can include new or expanding programs targeting an underserved or under-resourced demographic or a new office protocol or policy focusing on inclusivity.

The Department will continue to fund the County's homeless housing and shelter programs at current or increased levels.

With the Medi-Cal expansion, DSS collaborates with community based organizations and the Health Department, to reach our migrant community.

The Department will continue collaboration and cooperation with the Department of Emergency Management (DEM) to assist those impacted by natural disasters.

The Department ulitizes existing contracts with Bay Area Academy and UC Davis to expand diversity and inclusion efforts.

TIER 2: INTERNAL AND EXTERNAL

4. In what targeted ways will your department use the budgeting process to advance equity?
    - This can include adjustments in staffing, providing diversity, equity, and inclusion training opportunities for staff, or a commitment to delivering programs, services, research, or other actions with a focus on reducing disparities experienced in your department and the services provided to the public.

    The Department will be providing Diversity, Equity, and Iclusion (DEI) trainings as part of the State's required civil rights compliance plan. DSS will also continue to explore grant opportunities to expand outreach efforts to targeted to racially diverse economically disadvantaged communities in the county.

5. How will your department use targeted data to help inform recruitment, retention, and promotion efforts for staff of color, including executive, supervisory, entry-level, part-time, and field staff?
    - Please reference your department's Equal Opportunity Plan.

    Because DSS receives federal funds for Social Services programs, the state requires that we use a merit system principle for all recruitment, selection, and advancement opportunities. As such, DSS operates under the California Department of Human Resources (CalHR) Merit System Services (MSS) for recruitment and selection. DSS works closely with CalHR, MSS on the job announcement flyer, and advertises on social media and through community organizations in an effort to attract diverse candidates. In reviewing the Workforce Analysis report, the Department meets in the utilization of women and minorities meets for 8 of 9 job groups. This suggests that our recruitment efforts have been successful in attracting a diverse pool of candidates.

    For retention and promotion, DSS employees meet with their supervisor monthly to identify training needs, career goals and the resources that can help the employee thrive in their current assignment and prepare them for advancement. DSS also provides employee training opportunities with the goal of equipping employees with new skills and knowledge to increase their potential for advantage. The Department has also developed the "Mentoring Together" and "A Day in the Life" programs, where employees looking to better under the type of tasks and responsibilities for specific job classifications can request to a mentorship opportunity or a facilitated panel discussion and Q&A for the specific job classification they are interested in. All staff are invited to attend panel discussions and not just those who submitted the request further advancing our efforts toward ensuring equal employment opportunities are available for all.

6. Describe ways that your department used or will use racial and economic data to prioritize and develop criteria for resource distribution. What additional demographic data will your department collect, track, and analyze to assess equity impacts in the community moving forward and for future budget decisions?
    - Data Share Monterey County

- Race Counts: Monterey County
- American Community Survey

Community Action Partnership engages in the nationally recognized Next Generation Results Oriented Management and Accountability (ROMA-NG) framework for management and administration. To this end, we collect annual demographics data from all service recipients to capture and analyze the demographics.

This annual data is compared with census information and community partners who are trained and identified as "trusted community partners" within hard-to-reach communities. This cross-analysis process provides our unit with key information regarding discrepancies in census data (for example – our community believes the number of seasonal farmworkers transitioning in and out of our community is much higher than data reports due to high number of undocumented individuals who intentionally avoid being included in data reports) and helps indicate service deserts and underrepresented populations.

Community Action Agencies throughout the nation are known for taking a local and strategic approach to providing services through existing and trusted channels. This often means directing federal funding to small, grassroots organizations who are experts in unique services and maintain long-term, trusted relationships with vulnerable populations that would often not otherwise engage with government entities.

Community Action Partnership uses these relationships to develop comprehensive community needs assessment plans that support bringing attention to these often-overlooked populations and advocating for additional needs and customized services to continue be performed by local organizations. These plans are published on local and state platforms, including testimony performed by the Director of the Community Services and Development department at congressional hearings.

7. What additional disaggregated demographic data will your department collect, track, and evaluate to assess equity impacts in the community moving forward, and inform your future budget decisions?
    - Data Share Monterey County
    - Race Counts: Monterey County
    - American Community Survey

Monterey County Community Action Partnership (MCCAP) collects and includes current data on poverty and its prevalence related to gender, age, and race/ethnicity for the County of Monterey. MCCAP analyzes national and local quantitative data from several sources, including the U.S. census, the ACS survey, the Monterey Bay Economic Partnership, and the Monterey County Office of Education. We use this data to look for region-specific causes and conditions of poverty while examining the demographic profile of residents experiencing poverty, as well as their geographic distribution throughout the county. Annually, MCCAP undertakes several activities to gather qualitative data from low-income residents including administering a needs

assessment survey, collecting written testimonials, holding a public hearing, recording public comments, and documenting data from service providers.

TIER 3: EXTERNAL

Tip: When filling this out, consider the Community Engagement Guide included in your department's Title VI plan, the Spectrum of Community Engagement to Ownership, and using SMART goals for assessment and evaluation purposes.

8. How will your proposed budget enhance your department's ability to engage with and include historically under-resourced communities?

   The department is paying for staff resources to update all FCS policies. DSS has also hired a contractor to help with the development of the system improvement plan, including active community engagement.

9. How will that engagement be assessed and who will be a part of this self-assessment process?

   The position of Community Affiliation Manager was added to the Aging and Adult Service Branch to manage the Area Agency on Aging (AAA) program and the age wise grant to offer Aging and Disability Resource Centers (ADRC)/No Wrong Door entry into services. In addition, the Department is working on renovation projects that are being done with a lense of inclusion and equity, these include, the creation of gender neutral restrooms, and comfortable and inviting customer lobbies. Further, clients have access to lactation rooms.

10. What are the anticipated positive equity outcomes of these allocations?
    - For example, improved leadership opportunities, advisory committees, boards and commissions, targeted community meetings, stakeholder groups, increased outreach, etc.)?

    The Department was able to add the Community Affiliation Manager position to the Aging and Adult Service branch. This position works closely with the service/agency partners that the department contracts with, as well as the Area Agency on Aging (AAA) Advisory Commision to ensure that AAA services are meeting the needs of the aging, disabled and caregiver population of Monterey County.

    Monterey County Community Action Partnership (MCCAP) oversees the Community Action Commission (CAC) and the Commission on the Status of Women (CSW). The CAC is advisory to the Monterey County Board of Supervisors and is comprised of 15 members. Each of the five supervisorial districts is represented by three Commissioners; one from the public sector, one from the private sector and one from the low-income sector of the community, which reflects the race, economic status, and gender of the county. The CAC and MCCAP staff meet monthly to

support engagement in three main activities: contracting with local nonprofit agencies for services, engaging in collaboration with community stakeholders, and advocating and participating in community activities supporting the low-income community. Our overall mission is to develop, maintain, and evaluate community services that empower low-income individuals and families to improve their quality of life. The Commission on the Status of Women was established to advocate for Monterey County women on matters that particularly affect women, including affordable and quality childcare, education, housing, health, equal pay, sexual harassment, community services and related areas. The CSW and MCCAP staff meet monthly in an effort to fulfill their mission through planning, organizing and advocacy, capitalizing on a diversity of knowledge, backgrounds, and experiences.

11. How will the department ensure accountability, communicate, and evaluate the equity impact of budget modifications?

    The DSS Executive team will evaluate budget modifications with a diversity and inclusion lense. The DSS Executive team will meet monthly. This will be a standing item on the agenda.

12. How will the department measure outreach to under-resourced communities?

    DSS will track outreach efforts and issue monthly reports. The Department will track data over time.

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RESOURCE LIST

Civil Rights Office (CRO)

- County of Monterey Departmental Equal Opportunity Plans
- Email CRO for questions, capacity building, and resources: civilrights@co.monterey.ca.us
- Drop-in Hours:
    - Thursday, January 25, 2024 at 1 PM
    - Wednesday, February 7, 2024 at 10:30 AM
    - Wednesday, February 14, 2024 at 2 PM
    - Thursday, February 29, 2024 at 12 PM
    - Monday, March 11, 2024 at 1 PM
    - Thursday, March 21, 2024 at 11 AM
    - Wednesday, March 27, 2024 at 9 AM

Governing for Racial Equity (GARE) Resources

To access these links you will need to log in to the member portal. All county employees can set up an account with a county email address. It can take up to 48 hours to approve membership before resources can be accessed.

- Governing for Racial Equity Tools and Resources Page
- Advancing Racial Equity Online Training (self-paced)

Other Resources

- Race Forward Color Lines: Impact Assessment and Guide
- Spectrum of Community Engagement to Ownership
- Creating SMART Goals

Data Resources

- Data Share Monterey County
- Race Counts: Monterey County
- American Community Survey
- Census Bureau Table