

COUNTY OF MONTEREY

BUDGET EQUITY TOOL

Fiscal Year 2024 - 2025

Contact the Civil Rights Office with any questions:

civilrights@co.monterey.ca.us



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.



Monterey County employees understand, are committed to, and have tools to advance racial equity.

- Build capacity
- Train the workforce
- Assess for impact
- Identify improvement areas



Monterey County departments use racial equity tools to make program, policy, and budget decisions.

- Use the tools
- Collect data
- Inform decisions
- Track progress



Community members and organizations have meaningful engagement with Monterey County.

- PARTNER WITH ORGANIZATIONS TO ADVANCE RACIAL EQUITY
- COORDINATE EFFORTS
- TRACK PROGRESS

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.

None.

The Auditor-Controller provides the necessary budgetary resources for direct advertising to under-represented groups. In addition, training resources are provided to employees to assist with their performance goals and expectations and potentially prepare them for promotional opportunities. Training resources include Governmental Finance Officers Association (GFOA) webinars, the Leadership Learning Exchange, Becker Courses, Accounting Manager, and Alliance Career Training Solutions (ACTS). Attendance at job fairs is also supported.

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. NA

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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. NA

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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 Auditor-Controller has requested the addition of entry and journey level positions during the budget process for FY 2024-25. These positions offer additional opportunities to advance diversity through recruitment and promotion along with the various training resources as mentioned in Tier 1.

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?

The Auditor-Controller Human Resources Analyst reviews the data provided in report MC-HRM-EO-0003 during recruitment planning to determine the need for targeted advertising, partnership with other agencies, and the potential for promotional recruitments.

Resources used to promote recruitment, retention, and promotion efforts include:

- Use of the Talent Acquisition Database (TAD) along with placing advertising in minority focused websites and networks
- Continued availability of training resources and mentorship
- Partnership with CSUMB in recruitment efforts for entry level accounting positions
- Attendance at job fairs.

The Auditor-Controller's Office utilization numbers of minorities currently exceeds availability in all job groups except for Job Group 03, Professionals - Administration . However, with two new hires and other staffing changes occurring in March 2024, Job Group 3 will also exceed minority availability in April 2024.

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? NA
 - [Data Share Monterey County](#)
 - [Race Counts: Monterey County](#)
 - [American Community Survey](#)

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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? NA
 - [Data Share Monterey County](#)
 - [Race Counts: Monterey County](#)
 - [American Community Survey](#)

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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? NA
9. How will that engagement be assessed and who will be a part of this self-assessment process?
NA
10. What are the anticipated positive equity outcomes of these allocations? NA
 - For example, improved leadership opportunities, advisory committees, boards and commissions, targeted community meetings, stakeholder groups, increased outreach, etc.)?

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11. How will the department ensure accountability, communicate, and evaluate the equity impact of budget modifications? NA
12. How will the department measure outreach to under-resourced communities? NA

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](#)