



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.

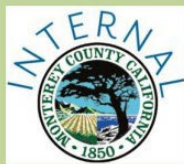
The Civil Rights Office is available to answer any questions or provide support while a department works through answering the questions.

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.

In the CAO's Budget Office, a limited staff of six cover the budgetary agenda with countywide engagement and limited expertise in equity issues.

In the CAO's Sustainability Program, current funding levels are not adequate to effectively address racial and economic equity needs in the climate and sustainability space for communities. To date, staffing has allowed the Sustainability Program to undertake several ambitious projects, including one equity centered project in the community of Pájaro for the Transformative Climate Communities Grant, and draft the Community Climate Action & Adaptation Plan (CCAAP). The CCAAP, adoption expected end of 2024/early 2025, will detail several strategies that have the potential to better community equity outcomes. In addition to existing staff roles, the Sustainability Program will likely need augmentations for a full-time equivalent position dedicated to community outreach and program enrollment in low-income and disadvantaged communities. The CCAAP will develop a Funding Roadmap to identify funding needs and augmentation requests for FY26.

In the CAO's Communications Bureau, with staff of three to cover all 27 departments, support all elected offices and outside agencies, it is limited in bandwidth. The Communications Bureau has recommended that resources be allocated for indigenous translation of some (if not all) of critical communications and outreach as well as the ability to fund American Sign Language interpreters for public meetings, press conferences, and some press briefings. Current staff is fortunately multi-cultural but could utilize the resources of outside consultants.

The CAO's Homeless Services program is committed to tackling inequities within the homelessness response system. Homeless Services participates in developing gap analyses to understand how disparities affect racially, gender, and ethnically diverse populations. Given the specialized focus of work, all grant applications prioritize equity as a foundational component of proposed projects.

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.

Given the CAO's oversight role of the Board of Supervisors' Strategic Initiatives (currently pending revision as Strategic Goals & Key Objectives), economic development, census, budget, and procurement, team diversity is critical to shaping policies and programs countywide.

In the CAO's Communications Bureau, the County funded an expanded team with new leadership, resulting in the enhancement of community engagement and outreach. Through the CAO's Budget Office, collaboration with the Board through their district budget workshops outside of business hours has continued. In addition, the enhancement of budget transparency and comprehension through the NeoGov online portal and public friendly documents such as the Budget in Brief have continued.

The CAO's Communications Bureau created all tools and materials that are culturally sensitive of various target audiences and have high standards for serving the needs of all regardless of income and race.

The CAO's Contracts & Purchasing Division continue to encourage participation of local companies to engage in County contract projects. In addition, Contracts & Purchasing Division provides more visibility through social media for vendor engagement regarding solicitations, the surplus program, and Vendor Expos.

The CAO's Sustainability Program is working directly with community-based organizations (CBO) to promote engagement in the CCAAP. However, best practices for CBO engagement recognizes that CBO partners are under resourced and over-capacity. As such, it is important to provide a budget and mechanism to directly compensate CBOs for their participation in County initiatives; the Sustainability Program recommends this measure be adopted. Additionally, the CCAAP Funding Roadmap will likely recommend the need for a full-time equivalent grant writer position to work directly with CBO partners. Sustainability Program funding is predominately grant based and highly competitive, so to ensure funding reaches communities most in need of resources the County must invest in its ability to successfully draw down these funds. As an example, the program is competing with jurisdictions like the City of San Diego that has 60 full-time equivalent positions dedicated to sustainability initiatives.

The CAO's Homeless Services program keeps equitable services at the core of all programs it develops. This can include reducing language barriers, outreaching to areas where Black, Indigenous, and People of Color communities convene, partnering with CBOs that represent the populations to gain valuable insight, advocating for funding sources that do not discriminate against people who are undocumented, providing transportation, addressing health inequities, ensuring meals are culturally appropriate, etc. To formalize these efforts, Homeless Services recommends including such language in contracts with CBOs that provide services to people experiencing homelessness.

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.

In the CAO's Contracts and Purchasing Division, policies promote disadvantaged, minority, woman- and veteran-owned businesses as well as local small businesses by adjusting competitive scoring points by 5-10% to reflect preferences. The website is equipped with an online registration so vendors can be notified of opportunities and partnerships plus a service satisfaction survey for vendors.

In the CAO's Economic Development Division, focus includes attracting and retaining businesses and employers with the goal to support the prosperity of residents. This is achieved through quality employment that provides skills training, livable wages, greater economic opportunity, and thereby enhanced revenues to sustain and improve community services and infrastructure.

Through the CAO's Communications Bureau, all critical communications are translated/interpreted into Spanish and in emergency situations strong efforts are made to have materials recorded in indigenous languages. The Communications Bureau also recognizes the digital divide in the County and utilizes old-school tools to communicate as well as the most modern technology available. The bureau supports and consults with all departments to help improve their practices.

The CAO's Office received a victims of crime grant from the California Office of Emergency Services and manages cannabis equity grants and outreach to assist with navigation of processes.

The Workforce Development Board has received funding for job training programs including:

- (1) healthcare and the agriculture industries through grants from the California State Workforce Development Board, working closely with local community colleges and employers as part of a Regional Equitable Regional Partnership grant. The outcome of these grant is to train low income, English language learners, first generation college students for jobs and careers that pay living wages and are in high growth and demand occupations. Additional State funded programs,
- (2) Building Trades Apprenticeships, for at risk individuals and marginalized communities and
- (3) workers dislocated by recent disasters to restore and repair public lands in the County.

In the CAO's Homelessness Services Program, the augmentation of a management analyst assists in the coordination of the interdepartmental Board of Supervisors Homelessness Committee.

The CAO's Sustainability Program is dedicated to centering equity outcomes in its work to reduce greenhouse gas emissions and adapt to the effects of climate change. Climate change is an equity problem where those able to adopt clean technology or afford to adapt to a warming climate will do so and disadvantaged populations and the most vulnerable stand to be left behind. The following examples of climate action programming with high equity potential are organized by climate sector and represent developing programming that will need to be expanded and staffed to implement the CCAAP.

Building emissions, primarily from methane gas for heating and cooking, are responsible for 26% of County greenhouse gas (GHG) emissions. Opportunities for mitigation include retrofitting homes to replace gas appliances with electric appliances, aiding residents for energy efficiency upgrades, and working with communities to develop community solar projects, all with a focus on low income and disadvantaged communities. A major equity driver behind this strategy is tied to the health risks linked to methane gas appliances. For example, children raised in homes with gas appliances are 42% more likely to experience asthma symptoms and a further study found that 20% of childhood asthma diagnoses in California are attributable to gas appliances.ⁱⁱⁱ While these studies focus on children, from COVID-19 it was found that many people are at

disproportionate risk for respiratory conditions, including the elderly and immunocompromised, and that these risks contract along racial and economic lines.ⁱⁱⁱ These risks are compounded by the social inequities of low-income people living in smaller homes with poorer ventilation.^{iv} This programming also has significant potential for economic equity by reducing the energy cost of low-income families, who are most vulnerable to price increases and spend the highest proportions of income on utility bills.

Transportation emissions account for 30% of County GHG emissions and strategies to reduce these emissions include transitioning to electric vehicles, expanding active and public transportation systems, and working with communities to plan walkable neighborhoods. Transportation programming is an equity opportunity because of the disproportionate cost of owning personal vehicles residents must shoulder to access healthcare, employment, and daily necessities in the current environment, and the compounding health effects of exposure to air pollution from fossil fuel powered vehicles such as fine inhalable particles (PM2.5) that exacerbate socioeconomic inequities like building emissions. Providing a variety of transportation options to families increases social mobility and provide greater levels of independence, particularly to low-income people, women, youth, and people unable to drive themselves.

Agriculture accounts for 33% of emissions in the County. Some strategies to mitigate these emissions provide substantial economic benefits to the public, including the conservation of and increased access to greenspace and urban forestry expansion, which can provide several health benefits.

The CCAAP will also cover adaptation strategies to respond to the effects of climate change that will disproportionately affect low-income communities and exacerbate health inequities experienced by the public. For example, heatwaves are linked to increased levels of asthma hospitalizations for children, which will be compounded as extreme heat become more common with climate change.^v Adaptation strategies will focus on providing programming to the most at-risk populations including those identified in the Safety Element and Environmental Justice Element for risks such as heat waves, severe weather and floods, and sea level rise.

The Homeless Services Director works with the Coalition of Homeless Services Providers, the Health Department, and the Department of Social Services through the Leadership Council and its committees to assess gaps in services and racial inequities identified in the homeless response system and plans accordingly. This commitment is underscored by our recent success in securing three grants aimed at supporting individuals experiencing homelessness in the community of Pájaro and the cities of Soledad and King, where people of color comprise the majority, many of which are also Indigenous.

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.

In the CAO's Budget Office the departmental budget and augmentation requests countywide are based on multiple criteria as detailed in the General Financial Policies adopted annually by the Board of Supervisors. These include the Strategic Initiatives (currently pending revision as Strategic Goals & Key Objectives), one of which is promoting access to equitable opportunities. A budget equity metric can serve as one of many countywide budget process deliverables for departments and be published in the recommended budget book alongside Strategic Initiatives.

The Sustainability Program will work with the CAO's Budget Office for augmentation and budget requests needed to implement and develop the CCAAP with a focus on equity centered outcomes per the upcoming Funding Roadmap. Current levels of staffing are insufficient to deliver responsive equity centered programs to the public.

The CAO's Homeless Services Program leverages the budgeting process in several targeted ways to advance equity. Staff are provided robust diversity, equity, and inclusion training opportunities through national, state, and local conferences and summits to foster a more inclusive work environment and improve service delivery. Programs and services are prioritized and designed specifically to reduce disparities experienced by underserved populations. For example, Homeless Services also sponsored the Lead Me Home Summit on Homelessness where discussions surrounding equity in programming were at the embedded throughout the agenda. The Summit hosted nearly 300 people representing elected officials, educational institutions, people with lived experience, service providers, medical institutions, and members of the public.

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](#).

Efforts to maintain a labor force that reflects the County continue throughout the recruitment, interview and hiring process, during mentoring and promotional opportunities, with the use of data to guide decisions. Overall, workforce metrics as gathered by Human Resources Management (HRM) continue to be positive in the CAO's Office.

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](#)

During the development of the FY 2024-25 budget, the CAO's budget office conducted several evening community meetings to obtain community input from those not typically able to provide feedback. One of those meetings was held at Board chambers and the public was available to participate in person or via zoom. Three other meetings were held virtually for constituents for three districts to attend and one final one was held in Salinas in person. All these meetings offered the opportunity for the community to provide feedback and ask questions about the County's budget.

The 2024 Legislative Program capital project priorities include safety projects at Nacimiento and San Antonio Dams and Reservoirs, a safe drinking water project for the community of San Lucas, the Broadway Family Connection Project in Seaside, pursuit of a veterans home facility, and many others. Some policy priorities include more equitable participation at public meetings and on boards of commissions.

In the CAO's Economic Development Division, efforts have included additional outreach to inform residents of Affordable Connectivity Program to encourage broadband use through the Federal Communications Commission, a Revolving Loan Fund that utilizes federal grant dollars to issue loans to local businesses that do not have access to capital, the use of ARPA funds to develop training seminars, programs, and services for businesses in underserved and underrepresented areas of the County.

Communications utilizes multiple analytic tools to ensure we are reaching all demographics and we measure that data on a regular basis and report our results to the Board of Supervisors on a quarterly basis as well as in our annual report to the Board. We also use that data to target market specific and relevant messages to specific target audiences base on the data we collect to make highly effective strategic communications decisions.

In the CAO's Homelessness Services Division utilizes racial and economic data to inform for resource distribution. This has led to programs that will offer services to underserved demographics such as South County residents, the Pajaro community, students experiencing homelessness, and individuals involved in the criminal justice system. We continue to explore new means to collect, track, and analyze data.

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](#)

In the CAO's Economic Development Division a Comprehensive Economic Development Strategy ([637622849934670000](tel:637622849934670000) (monterey.ca.us) with various data in published and includes homelessness by city, broadband coverage comparison between counties in addition to employment, educational attainment and socioeconomic statistics by subregion and overall demographic trends. Impact Monterey County's scorecards ([Scorecards – Impact Monterey County](#)) provide multiple metrics for economic self-sufficiency, safety, health and education to

help measure progress and foster collaboration. Finally, the National Equity Atlas ([Racial generation gap | National Equity Atlas](#)) houses regional indicators for a broad range of relatable socioeconomic issues by race and gender.

In the CAO's Contracts & Purchasing Division, continue to target minority, women, veteran and small local businesses to participate to engage in County contract projects. In addition, C&P will continue to provide registration support at our office if needed.

In addition to existing data collection methods, our department will implement strategies to gather disaggregated demographic data through the CalAIM implementation planning process and Stepping Up Initiative. This also includes utilizing the federal and state-mandated Homeless Management Information System (HMIS) to track project and client-level data, the State of California's Homeless Data Integration System (HDIS), and the U.S. Dept. of Urban Development's Annual Homelessness Assessment Report (AHAR). These data will inform future budget decisions and enhance our ability to serve populations disproportionately impacted by homelessness.

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?

Many of the existing countywide projects through the CAO's Office require collaboration with industry, labor and nonprofit organizations and other various groups throughout the area that have established relationships of trust with a broad spectrum of society that can be leveraged for further dialogue.

The proposed FY25 budget for the CAO's Sustainability Program is insufficient to fully deliver equitable climate action to the County and public. Future augmentations will be necessary to implement the CCAAP and will be informed by the CCAAP's Funding Roadmap. Current FY25 allocations are being used to imbed equity outcomes in the CCAAP and perform significant outreach to under-resourced communities.

The Homelessness Services Division's proposed budget enhances our department's ability to engage with historically under-resourced communities through increased operational funding and the addition of staff members. This supports ongoing efforts in community engagement and rapport-building activities. By partnering closely with community-based organizations and gathering direct input through community sessions, we ensure that our initiatives are responsive to the needs of marginalized populations. This engagement will be continually assessed to gauge effectiveness and adapt strategies as needed.

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

The County Administrative Office will further define appropriate engagement goals beyond volume of events such as meetings and workshops through the eventual filling of the Community Engagement position.

We continually seek input for dozens of Community Based Organizations to ensure we are hitting benchmarks we establish for community messaging penetration. We make adjustments on the advice of those CBOs and utilize their resources to amplify all our messaging.

The engagement process will be assessed through qualitative and quantitative data collected during community sessions and interactions with stakeholders. The self-assessment process may include community partners, other departments, and the Board of Supervisors.

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.)?

Better paying skills and employment that reduce poverty, increased access to benefits, assistance and opportunities for disadvantaged groups through appropriate staffing levels and outreach, reduce homelessness, more local disadvantaged groups become business owners and contract with the County, continue to leverage interdepartmental relationships and those with other entities to provide more comprehensive solutions to complex issues to improve efficiency and effectiveness, increased participation and understanding around County finances, more representative participation at meetings and on commissions.

As discussed in the CAO's Sustainability Program's response to question #3, climate action programming has many co-benefits including improved health outcomes, economic benefits, quality of life improvements, and more resilient communities. With proper staffing, the Sustainability Program will center these co-benefits and equitable outcomes in implementation of CCAAP activities.

Anticipated positive equity outcomes include fostering a deeper understanding of the populations we serve, identifying their specific needs and barriers, providing resources, and influencing change throughout the community and other departments. With additional staff, the reach of the Homeless Services can expand and increase participation in community-led projects or implement more programs from within the County.

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

Through the CAO's Budget Office, continued collaboration with the Board of Supervisors on district budget workshops outside of business hours. Continue to enhance budget transparency and comprehension through NeoGov online portal and public friendly documents such as the Budget in Brief. Introduce and incorporate a budget equity metric as one of many countywide budget process deliverables for all departments and publish it in the budget book alongside Key Performance Measures.

Overall, workforce HRM metrics continue to be positive in our office. Efforts to maintain a labor force that reflects the County will continue throughout the recruitment, interview and hiring process, during mentoring and promotional opportunities, with the use of data to guide decisions.

Homeless Services employs several key strategies including transparent processes, stakeholder engagement, equity analysis, data collection, monitoring, and reporting when applicable.

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

Communications utilizes multiple platforms to measure our outreach to underserved communities including but not limited to Meltwater, Cision, Nielson Data, Google Analytics, and Meta. We also regularly community with leaders from Community Based Organizations to solicit feedback on what and how we are communicating.

The CAO's Sustainability Program has partnered with the Health Department to train staff in the Community Partnerships for Advancing Equity program. Staff will incorporate these learnings and continue to work in collaboration with CBO partners to best reach underserved communities. The Program will track a variety of metrics including organizations reached, people reached, volunteer trainers trained, and communities served.

Homeless Services measures outreach to underserved communities through quantitative metrics such as attendance rates at community events, participation in community-led outreach, methods of communication, and qualitative feedback gathered during engagement sessions. This data informs ongoing efforts to tailor outreach strategies to effectively reach and include historically marginalized groups, ensuring equitable access to services and resources.

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](#)

ⁱ Weiwei Lin, Bert Brunekreef, and Ulrike Gehring, "Meta-analysis of the effects of indoor nitrogen dioxide and gas cooking on asthma and wheeze in children," *International Journal of Epidemiology*, Volume 42, Issue 6, (December 2013): 1724–1737, <https://doi.org/10.1093/ije/dyt150>

ⁱⁱ Gruenwald, Talor, Brady A. Seals, Luke D. Knibbs, and H. Dean Hosgood, III. 2023. "Population Attributable Fraction of Gas Stoves and Childhood Asthma in the United States" *International Journal of Environmental Research and Public Health* 20, no. 1: 75. <https://doi.org/10.3390/ijerph20010075>

ⁱⁱⁱ Josey, K. P., Delaney, S. W., Wu, X., Nethery, R. C., DeSouza, P., Braun, D., & Dominici, F. (2023). Air pollution and mortality at the intersection of race and Social Class. *New England Journal of Medicine*, 388(15), 1396–1404. <https://doi.org/10.1056/nejmsa2300523>

^{iv} Gary Adamkiewicz et al., "Moving Environmental Justice Indoors: Understanding Structural Influences on Residential Exposure Patterns in Low-Income Communities," *American Journal of Public Health*. 2011, <https://www.ncbi.nlm.nih.gov/pubmed/21836112#>

^v M. Ye, A. Ndovu, A.V. Nguyen, D. Long, T. Benmarhnia, and N. Thakur. Extreme Heat and Asthma Hospitalizations in Children in California (2017-2020) (abstract). *Am J Respir Crit Care Med* 2024;209:A2728.