

COUNTY OF MONTEREY

# BUDGET EQUITY TOOL

Fiscal Year 2025 - 2026

Contact the Civil Rights Office with any questions:

[civilrights@countyofmonterey.gov](mailto:civilrights@countyofmonterey.gov)



## **The Budget Equity Tool**

The County of Monterey's Budget Equity Tool (Tool) was inspired by local government entities nationwide. The 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 and reaffirmed it in 2022 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 Tool will be part of the County of Monterey Community Impact Action Plan, laying 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 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 CAO's Budget Office has a limited staff of six covering the budgetary agenda with countywide engagement and limited expertise in equity issues.

The CAO's Homelessness Strategies and Initiatives (HSI) division relies heavily on the ability to compete for and receive grant funding to support efforts to address homelessness in Monterey County. Regardless of the presence of grant funding, our office can review and recommend policies, promote interdepartmental and interagency collaboration, and embed racial and economic equity practices in all we do.

However, HSI is a very small team and lacks the capacity to fully cross-analyze the different means of data collection. The team diligently seeks other means of opportunities to increase budget and/or reach (i.e., free technical assistance) but these initiatives are time consuming and difficult to manage with three analysts.

The Monterey County Workforce Development Board (MCWDB) receives federal funding from the Department of Labor that is passed through the State of California's Employment Development Department (EDD). The team receives discretionary grant funding through the California Workforce Development Board. The terms and conditions of these grants require that outreach is performed to underserved communities and that education, training, and employment services are provided to assist individuals to overcome the impact of racial and economic disparities.

The CAO's Sustainability Program's current funding levels are not adequate to effectively address racial and economic equity needs in the climate and sustainability space for communities. To address this, the program has requested two management analyst positions as part of the FY 2025-26 budget process to focus on transportation, building efficiency, and electrification. These roles would be supported by external revenue to the County and will be crucial for implementing the Community Climate Action & Adaptation Plan (CCAAP). The CCAAP would reduce greenhouse gas emissions in their respective sectors and reduce racial and economic disparities in transportation access, energy affordability, and health outcomes from pollution mitigation. 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 CCAAP. The CCAAP, adoption expected in Summer 2025, will detail several strategies that can potentially improve community

equity outcomes. In addition to existing staff roles, added staff in the Sustainability Program would help ensure sufficient community outreach and program enrollment in low-income and disadvantaged communities. The CCAAP will develop a Funding Roadmap to identify future funding needs and augmentation requests to implement the goals of the CCAAP.

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.

The CAO's Budget Office does not directly administer programs/services but helps departments with resource allocation to implement their prioritized programs/services.

The HSI division supports the implementation of data-sharing initiatives between departments to increase efficiency and communication for people experiencing homelessness, to reduce barriers to county-provided benefits and services, and to foster a whole-person approach for these vulnerable individuals. People experiencing homelessness lack the resources to access resources, and county services are spread out, making transportation and managing several appointments difficult.

It is also recommended that the County implement a robust system to compensate people with lived experience for sharing their expertise with policy makers.

The Monterey County Workforce Development Board (MCWDB) uses its funding to provide services that reduce the impact of barriers to education, training, and employment for low-income individuals and communities of color. To ensure access to these services, MCWDB's Adult, Dislocated Worker, and Youth services providers use a translation service to ensure access to services for monolingual and/or foreign-born clients.

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, 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 by increasing program staffing. 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.

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 HSI division has three Encampment Resolution projects in rural areas of the County (Soledad, King City, and Pájaro). The vast majority, if not all, of the people these projects intend to serve, are people of color. Rural areas of the County have historically lacked substantial and effective resources for people to resolve their homelessness, which has led to encampments with severe levels of chronic homelessness. People experiencing chronic homelessness have an average lifespan of 25 years shorter than their housed counterparts; therefore, resolving their housing instability has direct ties to improving their overall health conditions while also improving the living conditions for the surrounding community.

The Monterey County Workforce Development Board (MCWDB) has received regional funding for:

- (1) its High Road Construction Careers pre-apprenticeship program housed in Monterey County that provides an opportunity for women, low-income individuals, and other historically disadvantaged populations to gain hands-on construction experience in a variety of trades to prepare for entry into State-registered apprenticeship programs.
- (2) MCWDB is also the lead on the Regional Equity and Recovery Partnerships grant providing healthcare and agricultural industry training at local community colleges through a grant from the California Workforce Development Board for low-income individuals, English language learners, and first-generation college students to prepare them for jobs and careers with living wages in high-growth and demand occupations. Locally, MCWDB administers a National Dislocated Workers Grant program that employs individuals displaced by recent disasters to restore and repair public lands in the County.

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 the climate sector and represent developing programming that must be expanded and staffed to implement the CCAAP. A full-time staff member is necessary to oversee the community engagement-focused work of each of the following sectors; in the FY 2025-26 budget, an augmentation was considered for a second staff person for the transportation and buildings sectors using external revenue. A third position for agriculture will need to be requested using additional external revenue and grant funds.

Building emissions, primarily from methane gas for heating and cooking, are responsible for 21% of County greenhouse gas (GHG) emissions. Opportunities for mitigation include retrofitting homes to replace gas appliances with electric appliances, aiding residents with energy efficiency upgrades, and working with communities to develop community solar projects, all focusing 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. 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. These risks are compounded by the social inequities of low-income people living in smaller homes with poorer ventilation. This program 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 39% 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 in coordination with regional partners.

Transportation programming is an equity opportunity because of the disproportionate cost of owning and maintaining personal vehicles residents must shoulder to access healthcare, employment, and daily necessities in the current environment. The compounding health effects of exposure to air pollution from fossil fuel-powered vehicles such as fine inhalable particulate matter (PM2.5) that exacerbate socioeconomic inequities like building emissions. Low-income people typically spend an estimated 30% or more of their income on transportation costs related to car ownership, an issue that is exacerbated along racial and socio-economic lines. Providing a variety of transportation options to families increases financial stability and social mobility. It provides greater levels of independence, particularly to low-income people, women, youth, and people unable to drive themselves.

Agriculture accounts for 32% 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 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. 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.

## 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 CAO's Budget Office works with elected officials and department heads to advance their prioritized programs that may be focused on diversity, equity, and inclusion through the annual budget process. Offices and departments submit augmentation requests, and the Budget Office reviews requests based on multiple criteria as detailed in the General Financial Policies, which are adopted annually by the Board of Supervisors. The criteria considered includes, but is not limited to, the Strategic Initiatives, including promoting access to equitable opportunities. Offices and departments have an opportunity to report on programs advancing equity and inclusion through the Recommended Budget through a combination of reporting on Key Performance Measures, Accomplishments, or Budget Year Goals.

HSI's budget includes allocations for staff to receive training on how to meaningfully include Diversity, Equity and Inclusion (DEI) practices into programs and policies. In FY 2024-25, the entire HSI team attended the National Alliance to End Homelessness conference where they learned about how certain populations are disproportionately marginalized and how to build inclusive programming for all.

The Monterey County Workforce Development Board (MCWDB) is committed to delivering programs and services to its client population with a focus on addressing educational and economic disparities for individuals needing additional assistance to initiate or complete training and/or enter employment. For FY 2024-25, in addition to setting aside over \$6 million for client case management and vocational training, MCWDB allocated: \$40,000 for core workplace skill level identification and remediation; \$45,000 for pre-vocational workshops to prepare individuals for employment; and \$52,000 for supportive services funding to assist clients to remain in training.

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. However, current levels of staffing are insufficient to deliver responsive equity centered programs to 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](#).

The HSI relies on the Human Resources Department to lead recruiting efforts on behalf of our office. However, to expand reach, the director shares links to the job posting with the wider network of direct service providers and on all social media platforms.

The Sustainability Program's preference for bi-lingual staff members will be included in hiring processes if approved by HR.

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 2025-26 budget, the CAO's Budget Office will conduct community meetings to obtain community input from those not typically able to provide feedback. These meetings will offer the opportunity for the community to provide feedback and ask questions about the County's budget.

The HSI division monitors unsheltered homelessness through the biennial homeless point-in-time county. Additionally, our office tracks homeless encampments and identified three large encampments in unincorporated areas of the County where services are nearly non-existent. These encampments are largely composed of, and are in communities where, the majority of the population are people of color. All major initiatives of this office are to address homelessness in underserved areas of the County.

The Sustainability Program focuses resources on disadvantaged communities and low-income communities as defined by AB 1550 and CalEnviroScreen whenever possible.

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](#)

Once in program, client demographics and outcomes will be tracked in the local Homeless Management Information System. This information will help our office monitor successes and identify areas for improvement and is currently being paid for by the Department of Social Services.

The HSI division also partners with the Lived Experience Advisory Directive of the local Continuum of Care to directly from people impacted by homelessness and how to improve service delivery.

In the CAO's Economic Development Division a Comprehensive Economic Development Strategy (<https://bit.ly/421XnDZ>) with various data published, including population trends, 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 provides 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.

Added program staff for the Sustainability Program would collect demographic information where feasible to track equity impacts of programs. Current staff levels are not able to track this information.

## 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 HSI director attends meetings held by and paid for by the Coalition of Homeless Services Providers to gain much-needed insights from people with lived experience. LEAD members are also invited to what was previously called the Homelessness Committee meetings so they can lift up their voices and concerns to policy makers. Additionally, the director sits on several committees with people with lived experience to work through complex issues in formal settings beyond listening sessions and public comment.

MCWDB's proposed budget fully supports engagement with historically under-resourced communities because many of the individuals in these communities meet low-income and other eligibility requirements to provide Workforce Innovation and Opportunity Act (WIOA) education, training, and employment services. In addition, MCWDB and its subrecipients occasionally hire members of historically under-resourced communities who have been served under WIOA or prior, similar programs who add value based on their experience being served through these programs.

Added Sustainability Program staff would focus on sector-specific scopes and dedicate more time to community outreach and engagement. Outreach campaigns would develop for transportation and buildings, participate actively in the Monterey Bay Area Climate Justice Collaborative and the Regional Climate Project Working Group's subcommittees on transportation and building electrification. These avenues for engagement with community-based organizations and trusted messengers to marginalized communities is key for equitable outcomes and program success.

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

Because of the County Administrative Office's rapport and regular engagement with the LEAD (every two weeks), we actively engage with people with lived experience to review proposed policies and programs and provide opportunities to provide a quality system of care. These items are reviewed throughout the planning process and before it goes to the Board of Supervisors for final approval.

Engagement will be assessed by the Sustainability Program Manager in collaboration with regional partners and leadership from community-based organizations. This external feedback will help guide future program developments.

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 CAO's Budget Office will engage in community meetings to disseminate information regarding the County's budget and provide opportunities for the community to participate and provide feedback on budget priorities. The budget office will continue to enhance budget transparency and comprehension through a streamlined website that is organized and accessible to the public with relevant budget information, such as the Recommended Budget and a Budget in Brief document.

The HSI division improved its understanding for staff, growth opportunities, and ability to attend and/or lead stakeholder meetings.

The Sustainability Program would need staff to advocate for equity centered outcomes in all programming related to implementing the CCAAP. This would include targeted community meetings in all county districts, stakeholder advisory groups, and program specific outreach campaigns. Added staff would participate in the Monterey Bay Area Climate Justice Collaborative to promote community involvement and ownership of projects to best engender positive equity outcomes.

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, which provides budget dashboards, 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.

The Sustainability Program's equity priorities and tactics will be written in to grant applications and program design, particularly with maximizing the co-benefits of climate projects to improve the quality of life for county residents.

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 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 Sustainability Program's outreach tracker for each climate action sector, i.e. transportation, buildings, and agriculture would be maintained by added staff dedicated to advancing programs. This will constitute an additional workload, therefore requiring added positions for successful tracking and implementation.

# RESOURCE LIST

## Civil Rights Office (CRO)

- [County of Monterey Departmental Equal Opportunity Plans](#)
- Email CRO for questions, capacity building, and resources: [civilrights@countyofmonterey.gov](mailto:civilrights@countyofmonterey.gov)
- Drop-in Hours:
  - [Thursday, February 13, 2025 – 1:00-2:30 PM](#)
  - [Thursday, March 6, 2025 – 1:00-2:30 PM](#)
  - [Thursday, March 27, 2025 – 1:00-2:30 PM](#)
- **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](#)