

M I L W A U K E E C O U N T Y



RACIAL EQUITY BUDGET TOOL



2021 BUDGET CYCLE

TABLE OF CONTENTS

Overview3

Milwaukee County Strategic Objectives4

Instructions.....5

Racial Equity Budget Tool Questions6

 Strategic Objective Category 1: **Diverse & Inclusive Workforce**6

 Strategic Objective Category 2: **People-Focused Design**6

 Strategic Objective Category 3: **Employee Perspective**7

 Strategic Objective Category 4: **Improved Performance & Equitable Practice**7

APPENDICES

Appendix A: Glossary.....9

Appendix B: Frequently Asked Questions.....10

Appendix C: Resources By Strategic Objective Category.....13

Appendix D: Public Participation Model14

Racial Equity Budget Tool Workgroup

- Jennifer Harris** – Office of African American Affairs
- Marques Hogans** – Office of African American Affairs
- Nicole Brookshire** – Office of African American Affairs
- LaCricia McSwain** – Department of Administrative Services
- Pam Matthews** – Department of Administrative Services
- Dan Laurila** – Department of Administrative Services
- Joe Lamers** – Department of Administrative Services
- Jessica Peterson** – Department of Health & Human Services
- Cassandra Torres-Adams** – Department of Health & Human Services
- Matt Fortman** – Department of Health & Human Services
- Kelly McKone** – County Executive’s Office

*By achieving racial equity,
Milwaukee is the healthiest county in Wisconsin.*

MILWAUKEE COUNTY VISION STATEMENT

Overview

Racism has been and is a public health crisis in Milwaukee County. According to the County Health Rankings, Milwaukee County is, and has consistently been, one of the lowest-ranked counties for health in Wisconsin and, according to Federal Reserve Economic Data, Milwaukee County is one of our nation’s most racially segregated areas.

According to 2019 statistics, a white person lives, on average, nearly 14 years longer than a black person and the infant mortality rate is nearly three (3) times higher for black infants compared to white infants. Race is a social construction with no biologic basis, yet racism may produce an assigned societal value based on the way a person looks that has resulted in race being a consistent predictor of a person’s quality and length of life.

The Racial Equity Budget Tool (REBT) is a structured racial equity lens for departments to use to critically assess the impacts of budget decisions on communities of color. The tool is structured around the County’s strategic planning [three-year objectives](#) to help departments and decision makers better understand the pain points and opportunities to advancing the three-year objectives. As a first effort, we

Milwaukee County’s Racial Equity Budget Tool (REBT) is designed to:

Make intentional connections between the strategic plan and the budget.

Use racial equity as the key guiding principle for important decisions regarding investments or disinvestments.

Initiate conversations on topics related to the three-year strategic objectives among department leaders and employees.

Provide baseline data on departmental efforts to inform enterprise-wide decisions.

expect there will be some departments that are further along than others – that is okay. The 2021 budget will provide a baseline of where we stand today and assist the County on how it can improve moving forward.

Milwaukee County Strategic Objectives

In 2019, Milwaukee County launched its first strategic plan in 20 years. This plan explicitly recognizes, “racism as a public health crisis” and leads with the vision that: **By achieving racial equity, Milwaukee is the healthiest county in Wisconsin.**

As part of the strategic plan, County leaders committed to the three-year objectives listed below. The objectives and the use of a racial equity budget tool are being institutionalized across the county. The questions in this budget tool were guided by the three-year objectives and were informed by best practices from other jurisdictions and the Government Alliance on Race and Equity (GARE).

1. Diverse & Inclusive Workforce

- Milwaukee County leadership, management, and staff will reflect the demographics (including, but not exclusively racial) of Milwaukee County.
- Milwaukee County will have an inclusive workplace culture where differences are welcomed, where different perspectives are heard, and where individuals feel a sense of safety and belonging with no significant differences by race and gender.
- Employees will understand what skills and experience are expected to advance to the next level and will have opportunities to gain those skills and experiences.

2. People-focused Design

- Milwaukee County will determine what services we offer and how money is spent based on robust, diverse public participation.

- Milwaukee County will determine where services are offered based on robust, diverse public participation.
- Milwaukee County will determine how services are offered based on robust, diverse public participation.

3. Employee Perspective

- Milwaukee County leaders and management will regularly consult and problem solve with a racially diverse representation of frontline staff to inform equitable policy, process, and service user delivery decisions.

4. Improved Performance & Equitable Practice

- Milwaukee county monitors and evaluates the impact and equity of all services on users and uses data to continuously improve.
- Milwaukee County will be held accountable by external partners and community members for progress and results on the strategic plan.

5. Fiscal Health

- Milwaukee County will secure additional revenue and achieve cost savings each year between 2020 – 2023 to be able to cover existing operating costs.
- Milwaukee County will identify and implement mechanisms to make investments into strategic priorities to achieve objectives as identified by the strategic plan.

Instructions

1. Submit only one REBT per Department.

The REBT should reflect an analysis of the suite of budget decisions per department. Within answers to each question, **details may be provided at the division level**, as determined appropriate. Decision points should be analyzed as part of the comprehensive effort that your Department is undertaking in addressing racial equity in programs, plans, policies, and power structures. Since departments are often tasked with cutting their budgets to reflect a reduction from their previous fiscal year's budget, a REBT should also include an analysis of how proposed reductions may or may not burden black and brown individuals and communities.

2. Keep the focus on the analysis of departments' improvements, reductions, and overall budget.

The REBT will focus on a racial equity analysis of decisions for new policies, programs, and plans under consideration, and also the department's ongoing commitment to racial equity.

3. Use demographic data to help your department determine benefits and burdens of new decisions and overall budget.

State and federally collected demographic data resources are provided in [Appendix C](#). Departments are encouraged to

use any data they collect on their service users throughout the completion of the REBT. Data from other relevant and credible sources a department may have is also acceptable.

4. REBT technical assistance information and opportunities.

REBT training and technical assistance opportunities will be available at dates to be determined and communicated later. All persons who may be expected to assist the department director in completing the REBT will be encouraged to participate. The learning opportunities (post COVID-19 pandemic) will take place on Milwaukee County web-based platforms (Skype/Microsoft Teams platform) for individual and group drop-in sessions.

- If you understand the question, but have difficulty determining how to answer a question, please contact your Budget Analyst for assistance.
- The Office on African American Affairs should only be contacted on questions related to the racial equity components (glossary, concepts, etc..) that are unclear and cannot be addressed by your Budget Analyst. Send correspondence via email to AfricanAmericanAffairs@milwaukeecountywi.gov.

*This is a fillable PDF form.
If fillable fields are not shown automatically, please
make sure "Highlight Existing Fields" tab is selected.*



RACIAL EQUITY BUDGET TOOL

Date Submitted:

Department:

Please note: each response field below has a 2,500 character limit.

STRATEGIC OBJECTIVE CATEGORY 1: DIVERSE & INCLUSIVE WORKFORCE

What activities are you doing to attract and retain a diverse and inclusive workforce in your department? What are the associated costs of these activities?

How do you use professional development and advancement opportunities to advance equity in your department's workforce? What resources are used to support these opportunities for professional development and advancement?

STRATEGIC OBJECTIVE CATEGORY 2: PEOPLE-FOCUSED DESIGN

How and when have service users, particularly users of color, and other key stakeholders been engaged to inform decisions about your requested budget (Who was involved, what was the forum, what were the results)?

What are the multi-lingual needs of your department's service users? How do you use your budget to meet these language needs?

STRATEGIC OBJECTIVE CATEGORY 3: EMPLOYEE PERSPECTIVE

Our employees can be a great resource for innovation and knowing what is working well and what needs work. Have you engaged a diverse group of frontline employees to inform decisions about your proposed budget changes? If yes, how was input solicited, who was involved, and what were the results?

STRATEGIC OBJECTIVE CATEGORY 4: IMPROVED PERFORMANCE & EQUITABLE PRACTICE

Describe ways in which racial and economic data was used to prioritize resource distribution. (Data can include sources found in the resources section of this tool, department collected data, or any other relevant data from other sources.)

What are the positive or negative racial equity implications of your proposed budget changes? For reference departments may refer to the “Form 1 – Major Changes” tab of your Supplemental Forms 2021 spreadsheet. Any change with identified impacts should be described.

What are the expected benefits and potential unintended consequences to disadvantaged communities of your proposed budget changes?

a. What analysis did you do to determine the expected benefits and potential unintended consequences?

b. What will your department do to mitigate unintended consequences resulting from your proposed budget changes?



Appendices

Appendix A:
Glossary

Appendix B:
Frequently Asked Questions

Appendix C:
Resources by Strategic Objective Category

Appendix D:
Public Participation Model

APPENDIX A

GLOSSARY

Communities of color: In the context of the Milwaukee County Racial Equity Budget Tool, the term communities of color is interchangeable with black and brown communities and inclusive of all non-white populations of color.

Disadvantaged communities: A collective term for referencing communities that have historically experienced inequities where they learn, live, and work that were/are not optimal due to disenfranchisement, disinvestment, marginalization, racism and other systems of oppression.

Diverse (AMOP): Diversity includes all the ways in which people differ, and it encompasses all the different characteristics that make one individual or group different from another. It is all-inclusive and recognizes everyone and every group as part of the diversity that should be valued. A broad definition includes not only race, ethnicity, and gender — the groups that most often come to mind when the term “diversity” is used — but also age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, and physical appearance. It also involves different ideas, perspectives, and values.

Diverse group: As it relates to question 5, an intentional effort to include individuals from different racial, ethnic, gender, and social backgrounds proportionate to the diversity of the department.

Economic data: Numerical data collected based on service delivery criteria determined by departments.

Equity: The assurance that the culture, values, and opinions of individuals and groups are represented in the decision-making processes.

Frontline employees: A grouping of Milwaukee County employees that serves as the initial point of contact for service users or a range of employees from all levels of the workforce with emphasis on the inclusion of direct service rendering staff.

Inclusive workforce: A workplace environment that recognizes the contributions of all employees, while valuing

their social status, race, gender, or other demographic classifications.

Key stakeholders: Both internal and external individuals, agencies, or organizations whom participate in the planning, development, implementation and decision-making process of an activity, process, or service delivery. (AMOP- Key stakeholders are service users, the workforce, partners, governing boards, donors, suppliers, taxpayers, regulatory bodies, policy makers, funders, and local and professional communities)

Multi-lingual needs: The ability of Milwaukee County departments to address linguistic needs for all service users through staffing, documentation, and other communication platforms.

People-focused: An actual or potential internal or external user of Milwaukee County’s programs or services. Milwaukee County examples include our own employees, cities and villages, program clients, out-of-county visitors, building occupants, non-voters, and any person that touches our services (e.g., a taxpayer, a rider of the bus, a caller to the Aging Resource Center, a BHD patient, a Zoo patron, or an inmate).

Professional advancement: Opportunities for staff to build their capacity and ascend or pursue lateral movement to further advance their career trajectory.

Racial data: Demographic data collected by Milwaukee County Departments that identifies the race/ethnicity of service recipients.

Racial equity (AMOP): When race no longer determines one’s socioeconomic outcomes; when everyone has what they need to thrive, no matter where they live.

Service user: Current or potential user of Milwaukee County services.

Unintended consequences: Outcomes of a purposeful action that are not intended or foreseen.

APPENDIX B

FREQUENTLY ASKED QUESTIONS

PURPOSE

1) What is the purpose of using this tool?

The Racial Equity Budget Tool (REBT) has many intended purposes:

- It is about making an intentional connection between the strategic plan and our budget. We cannot sufficiently change our institution if we do not think critically about how and what we are spending money on.
- Whether we are making investments or disinvestments, we must do so with racial equity as the key guiding principle to those important decisions.
- It is meant to spur conversation on topics related to the three-year strategic objectives among department leaders and employees so we are all challenging ourselves to think critically about our efforts to advance the vision.
- The county hasn't solidified its approach to achieving the three-year objectives and leaders are lacking key information about the current state of each department. This tool is an opportunity to baseline departmental efforts to make informed enterprise-wide decisions.

These are only some of the many answers to why we are using a tool to assess budget decisions.

2) What other jurisdictions have used a racial equity budget tool? How successful were their efforts? Where did the budget tool questions come from?

Milwaukee County's REBT builds on the success of other jurisdictions in implementing a budget tool. Jurisdictions the County looked to for guidance including the City of Seattle, the City of Portland (Ore.), King County (Wash.), and the City of San Antonio. Resources from the Government Alliance on Race and Equity (GARE) were also used. The questions are largely framed around the County's strategic plan three-year objectives.

3) How does this tool work when departments are making disinvestments year over year? What is the point of doing this when departments don't have a lot of latitude about what disinvestments to make?

Whether the County is making disinvestments or

investments, those decisions must be made with racial equity at the forefront of decision-makers' minds. Additionally, the county has a strategic plan which places emphasis on transforming our organization by focusing on root-cause solutions related to the "Power to Make Change" and "Institutional Practices" (see the [Health and Equity Framework](#)). Departments should think critically about their current assumptions and spending versus shifting investments to address root-causes of inequities.

COMPLETING THE TOOL

4) Are there right answers to the questions?

Responses to this tool will inform our future action to see where the County can improve on the path to racial equity. There is no right answer to the questions and each department is starting in a different place, serves different people with different needs, and is facing a different set of barriers and opportunities. While there are no right answers, the information given in the tool will be used for decision making and will be available to the public, so answers should be robust, defensible, and easy to understand. Your department's answer may look very different than another department's answer and that is okay as long as the answers address the question.

5) What if there are inequities to other groups other than racial groups? Should we be talking about those inequities in our analysis?

Yes! Milwaukee County is race forward, but not race exclusive. If there are other inequities identified in your analysis, please include them.

6) Does every department complete one tool, or is it one tool for each division?

Please submit one tool per department. Responses can be broken down at the division level within your department's tool, as appropriate. All questions should be completed.

7) Who is responsible for filling out the budget tool?

The department head is ultimately responsible for the content in the REBT. It is up to department leadership to determine who in their department is most appropriate to be involved in completing questions in the tool, which is going

APPENDIX B

FREQUENTLY ASKED QUESTIONS

(CONTINUED)

to differ from department to department. Likely people to include are department leaders, fiscal staff, administrative staff, and Racial Equity Ambassadors.

8) Is this tool supposed to imply that we should be taking actions on each of these items? Are the questions meant to be directives to departments?

The tool is meant to spur conversations among department leaders and staff about topics related to the county's strategic direction and what they are and are not able to do in a given budget year. To that end, the tool is not directive to departments. We fully expect that some departments' answers to some of the questions will be that they are not doing anything this year with an explanation about why that is the case. This is the first year of executing against a strategic plan for the county, and our first year using a robust budget tool, so we want to understand where progress is happening and not happening to inform larger discussions about approach.

9) How do I use this when my work is statutorily required?

What services Milwaukee County provides is often statutorily required. However, how we do our work usually is not a directive. This tool is meant to challenge us all to think about how to do the enormous part of our work that is within our discretion and control.

10) Is there a standard approach all departments are expected to take to answer the questions?

No. Answer the questions based on the approach your department currently takes on these items.

11) Should enterprise-wide guidance or support be given to departments to tackle some of these questions and three-year objectives?

The budget tool is a living document and as the County's approach to achieving its three-year objectives evolves, then so will the questions in the tool. Presently there are not necessarily enterprise-wide solutions to all of the three-year objectives, especially not at the capacity needed to serve a 4,000+ person workforce. This first year of the budget tool is in-part about collecting current-state information about departments' strengths, opportunities, and present

approaches to the three-year objectives to inform larger discussions about the county's approach.

12) What type of analysis is expected for each of the questions?

It depends on what your department is currently doing in each area. Please use the diverse expertise and experiences of staff in your department to determine the most appropriate way for your department to answer the questions.

13) What part of the budget is this tool being applied to?

The REBT will focus on an equity analysis of decisions for new policies, programs, and plans under consideration, and the Department's ongoing commitment to equity. Your Department is asked to identify what considerations are considered in the overall budget to maximize equitable outcomes.

USING THE DATA

14) Who will receive the data departments provide in the REBT? Who will be expected to answer questions about the information provided?

Responses to the REBT will be publicly available and will be presented to the County Board. If any decision-makers (i.e., County Executive, Cabinet, County Board Supervisors) have questions about the information provided in the REBT, the department should be prepared to answer them. We are all partners in the County's strategic planning effort to achieve racial equity, and the budget tool is in-part meant to inform and focus conversations around strategic priorities, understanding that not all questions have known answers or solutions.

15) What if someone questions the analysis, conclusions, or recommendations made in the budget tool?

Like all research and analysis, there will be questions and critiques and we should embrace those important conversations. The work presented in the budget tool should be defensible, but most of these questions don't have a clear right and wrong answer. If someone finds something wrong in the analysis, then we need to fix it. However, if it is a question about the interpretation and meaning of the

APPENDIX B

FREQUENTLY ASKED QUESTIONS

(CONTINUED)

analysis, then let’s make space for different perspectives to find the best path forward we can with the information we have available.

LOGISTICS

16) When will the budget tool be due?

The REBT is due on July 15 — the same due date as the requested budget.

17) Where do I go if I have questions?

If you understand the question, but have difficulty determining how to answer a question, please first try to problem solve within your department by looping in

additional experts (e.g., Racial Equity Ambassadors, people leaders, front-line staff).

If you need assistance understanding what the question is asking, contact your Budget Analyst for assistance.

In addition, trainings and “drop-in” sessions are being planned to assist departments with completion of the REBT. These sessions are expected to occur in May and June.

The Office of African American Affairs should only be contacted on questions related to racial equity components (glossary, concepts, etc.) that are unclear and cannot be addressed by your budget analyst. Send correspondence via email to AfricanAmericanAffairs@milwaukeecountywi.gov.

APPENDIX C

RESOURCES BY STRATEGIC OBJECTIVE CATEGORY

STRATEGIC OBJECTIVE 1: **Diverse & Inclusive Workforce**

- [2020 Milwaukee County Workforce Audit](#)

STRATEGIC OBJECTIVE 2: **People-Focused Design**

- [Public Participation Model](#)

STRATEGIC OBJECTIVE 3: **Employee Perspective**

- No resources available currently

STRATEGIC OBJECTIVE 4: **Improved Performance & Equitable Practice**

- [American Community Survey](#) (from US Census Bureau – descriptions below from US Census Bureau)
 - [Data Profiles](#) have the most frequently requested social, economic, housing, and demographic data. Each of these four subject areas is a separate data profile. The data profiles summarize the data for a single geographic area, both numbers and percent, to cover the most basic data on all topics. (Can compare state/County/Municipal data. With some effort, can get zip code level data.)
 - [Narrative Profiles](#) are short, analytic reports derived from the ACS 5-year estimates. Each Narrative Profile covers 15 different topic areas and provides text and bar charts to display highlights of selected social, economic, housing and demographic estimates for a selected geographic area. (Easy to get zip code level data)
- [Personal Income Data](#) (Bureau of Economic Analysis) Per Capita Personal Income by State/County, 2016 – 2018 for the entire nation.
- Per Capita Income by County)
- [Public School Enrollment](#) (WI Dept. of Public Instruction)
- [Private School Enrollment](#) (WI Dept. of Public Instruction)
- [State of Wisconsin WBE/MBE/DVE](#) This provides a list of all Woman/Minority/Disabled Vets Business Enterprise information. You can search by business name. by product/service, and by location.
- [Milwaukee County Diversity and Compliance Website \(B2GNow\)](#) Links to certified lists for the State of Wisconsin ACDBE/DBE/SBE Directory and the Milwaukee County approved DBE/SBE vendors (Training available on using system)

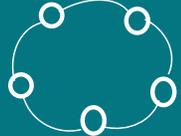
Additional County Resources

- [Strategic Plan \(Objectives\)](#)
- [Health and Equity Framework](#)

APPENDIX D

PUBLIC PARTICIPATION MODEL

INCREASING THE IMPACT ON THE DECISION

	INFORM 	CONSULT 	INVOLVE 	COLLABORATE 	EMPOWER/LEAD 
PUBLIC PARTICIPATION GOAL	To provide the public with valanced and objective information to assist them in understanding the problem, alternatives, opportunities and/or solutions	To obtain public analysis, alternatives and/or decisions.	To work directly with the public throughout the process to ensure that public concerns and aspirations are consistently understood and considered.	To partner with the public in each aspect of the decision including the development of alternatives and the identification of the preferred solution.	To place final decision making in the hands of the public.
PROMISE TO THE PUBLIC	We will keep you informed	We will keep you informed, listen to and acknowledge concerns and aspirations, and provide feedback on how public input influenced the decision.	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public influenced the decision.	We will look to you for advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible.	We will implement what you decide.



MILWAUKEE COUNTY
HEALTH &
RACIAL EQUITY

ONE COUNTY ONE VISION

By achieving racial equity, Milwaukee
is the **healthiest county in Wisconsin.**

county.milwaukee.gov/vision