



**MILWAUKEE
COUNTY**

**RACIAL EQUITY
BUDGET TOOL**

2023 BUDGET CYCLE

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*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.

Milwaukee County began using a Racial Equity Budget Tool (REBT) during the 2021 budget to ensure budget resources are allocated based on strategic priorities that advance the County’s vision to become the healthiest county in Wisconsin. The 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 Milwaukee County’s strategic focus areas to help departments and decision makers better understand the challenges and opportunities to advancing Milwaukee County’s vision.

By initiating use of the REBT for the 2021 budget process, Milwaukee County developed a system to collect baseline data at the departmental level, pertaining to the strategic plan and budget. For the 2022 budget process, baseline data collection continued, and the responses to the REBT factored into funding decisions in the budget. New questions were added to the REBT that generated ideas for advancing the County’s vision. Several of ideas submitted in departmental REBTs had a direct impact on the final 2022 Adopted Budget. Examples of these included:

- Funding a diversity recruiter in Human Resources to focus exclusively on external diverse recruitment efforts.
- Funding a dedicated workforce and data analytics expert

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 and analyze progress** on departmental efforts to inform enterprise-wide decisions.

- in Human Resources to help drive racial equity KPI.
- Prioritizing compensation funding toward equity-based adjustments.
- Lowering the cost of phone calls for residents in the House of Correction and County Jail.

Now that Milwaukee County has baseline data on past departmental efforts and plans, there is an expectation departments show progress year over year in their

Overview (CONTINUED)

responses to questions. Each department may be at a different place in its ability to advance the County's strategic plan. As in years past, there is no right or wrong answer to questions. As part of the 2023 budget process, the Office of Strategy, Budget and Performance and County Executive Crowley will be reviewing REBT responses and looking at departmental progress from prior years to identify opportunities and departments that may need additional assistance. Therefore, please be sure to

reference any departmental progress on items called out in the department's prior year REBT.

The last new change this year is related to question 9. The question has not changed, but there is a new requirement that departments submit a corresponding Supplemental Budget Request form in Sherpa for each project/activity mentioned in its answer to receive consideration during the Recommendation Phase of the budget.

Milwaukee County Strategic Focus Areas

Milwaukee County's strategic plan explicitly recognizes that racism is 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, Milwaukee County leaders committed to use a racial equity budget tool to ensure resource allocations advance the strategic focus areas and vision. The questions in this budget tool were guided by the strategic plan and were informed by best practices from other jurisdictions and the Government Alliance on Race and Equity (GARE).

1. Create Intentional Inclusion

- Reflect the full diversity of Milwaukee County at every level of County government.
- Create and nurture an inclusive culture across the Milwaukee County government.
- Increase the number of Milwaukee County contracts awarded to minority- and women-owned business.

2. Bridge the Gap

- Determine what, where, and how we deliver services based on the resolution of health disparities.
- Break down silos across Milwaukee County government to maximize access to and quality of services offered.
- Apply a racial equity lens to all decisions.

3. Invest in Equity

- Invest "upstream" to address root causes of health disparities.
- Enhance Milwaukee County's fiscal health and sustainability.
- Dismantle barriers to diverse and inclusive communities.

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. Training and technical assistance will take place on Microsoft Teams.

- If you understand the question, but have difficulty determining how to answer a question, please contact your budget analyst for assistance.
- The Office of Equity should only be contacted about 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 EquityOffice@milwaukeecountywi.gov.

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



MILWAUKEE COUNTY

RACIAL EQUITY BUDGET TOOL

Date Submitted:

Department:

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

STRATEGIC FOCUS AREA 1: CREATE INTENTIONAL INCLUSION

1. 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?

2. How do you use professional development and advancement opportunities to promote equity in your department's workforce? What resources are used to support these opportunities for professional development and advancement (include staff time; does not have to be financial only)?

3. 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?

4. Are you tracking contracts with minority and women-owned business? If yes, please share percentages of each. If no, why not?

STRATEGIC FOCUS AREA 2: BRIDGE THE GAP

5. How and when have service users, in diverse and inclusive communities, and other key stakeholders been engaged to inform decisions about changes in funding levels for services provided in your requested budget (who was involved, what was the forum, what were the results)?

6. 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.)

7. How does your budget reflect efforts to work across departments to break down silos to maximize access to and quality of services offered? How does this help us achieve the vision of achieving equity and health?

8. 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?

STRATEGIC FOCUS AREA 3: INVEST IN EQUITY

9. If your department were to receive some additional funding for addressing racial equity, what specific strategic plan priority would you address, what would be the project/activity and intended outcome, and *how much would it cost*? For each project/activity to receive further consideration during the Recommendation Phase of the budget, the department must also submit a Supplemental Budget Request form in Sherpa during the Request Phase of the budget.

10. What is your department doing to dismantle barriers to diverse and inclusive communities, including meeting multilingual needs and other communication or accessibility barriers?



Appendices

Appendix A:
Glossary

Appendix B:
Frequently Asked Questions

Appendix C:
Resources by Strategic Focus Area

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.

Diversity: 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 just, fair, and impartial treatment, acceptance, or behavior of people without favoritism or discrimination. Equity means righting wrongs, doing what’s right, and giving people what they need to thrive, which is different from equality, which means everyone gets the same thing regardless of circumstance or need.

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.

Inclusion: Assurance that the culture, values, and opinions of individuals and groups are represented in the decision-making processes.

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 who 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.)

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

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: The just and fair inclusion of all people in society, regardless of their race/ethnicity, with unfettered ability to participate, prosper, and reach their full potential. Racial equity is achieved when race no longer determines one’s health and socioeconomic outcomes and when everyone has what they need to thrive and decide what’s best for themselves, their families, and their communities, 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 strategic focus areas among department leaders and employees so we are all challenging ourselves to think critically about our efforts to advance the vision.
- 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? 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 Milwaukee County looked to for guidance include 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 Milwaukee County's strategic plan.

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

Milwaukee County's structural deficit and budget challenges are no secret. However, Milwaukee County still has an annual budget of over \$1 billion. Whether the County is

making disinvestments or investments, those decisions must be made with racial equity at the forefront of decision-makers' minds. 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 Milwaukee County can improve on the path to health and 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 faces a different set of barriers and opportunities. While there are no right answers, the information provided in the tool will be used for decision making throughout the budget process and will be available to the public. Therefore, 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 will differ from department to department. Likely people to include are department leaders, fiscal staff, administrative staff, and Racial Equity Ambassadors.

APPENDIX B

FREQUENTLY ASKED QUESTIONS

(CONTINUED)

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?

A budget is a reflection of priorities. Ultimately, Milwaukee County’s budget should reflect our values and advance our vision and strategic plan. However, we acknowledge our organization is on a journey to continuously improve our efforts toward health and racial equity. The REBT is meant to spur conversations among department leaders and staff about what they are and are not able to do in a given budget year to advance the vision. To that end, the tool is not an absolute directive to departments. In years one and two there were no set expectations, but in year three there is an expectation that departments show how their budgets help Milwaukee County make progress toward its vision.

9) How do I complete a Supplemental Budget Request form in Sherpa for responses to Q9?

Fiscal staff can refer to the Operating Budget Instructions for how to complete this form.

10) 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.

11) 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.

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 (e.g., County Executive, County Board Supervisors, department directors) have questions about the information provided in the REBT, the department should be prepared to answer them. We are all partners in Milwaukee 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 these important conversations. The work presented in the budget tool should be defensible, but most of these questions do not have a clear right or 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 analysis, then we can make space for different perspectives to find the best path forward with the information we have available.

16) Will the budget tool submissions be scored?

No, the REBT submissions will not be scored. However, they will be made available to the public and reviewed by the County Executive’s office, the Office of Equity, the Office of Strategy, Budget and Performance, and the Board of

C O N T I N U E D

APPENDIX B

FREQUENTLY ASKED QUESTIONS

(CONTINUED)

Supervisors.

LOGISTICS

17) When will the budget tool be due?

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

18) 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, frontline staff).

If you need assistance understanding what the question is asking, contact your budget analyst for assistance.

As in years past, “drop-in” sessions are being planned to assist departments with completion of the REBT. These sessions are expected to occur in June.

The Office of Equity should only be contacted about 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 EquityOffice@milwaukeecountywi.gov.

APPENDIX C

RESOURCES BY STRATEGIC FOCUS AREA

STRATEGIC FOCUS AREA 1: **Create Intentional Inclusion**

- [2020 Milwaukee County Workforce Audit](#)

STRATEGIC FOCUS AREA 2: **Bridge the Gap**

- [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](#) (Wisconsin Department of Public Instruction)
- [Private School Enrollment](#) (Wisconsin Department 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)

STRATEGIC FOCUS AREA 3: **Invest in Equity**

- [Public Participation Model](#)

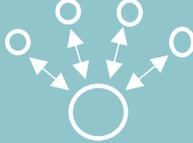
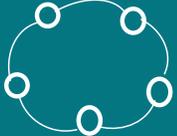
Additional County Resources

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

APPENDIX D

PUBLIC PARTICIPATION MODEL

INCREASING THE IMPACT ON THE DECISION

| |  <p>INFORM</p> |  <p>CONSULT</p> |  <p>INVOLVE</p> |  <p>COLLABORATE</p> |  <p>EMPOWER/LEAD</p> |
|---------------------------|---|--|---|---|--|
| 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. |



ONE COUNTY ONE VISION

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

county.milwaukee.gov/vision