

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



# RACIAL EQUITY BUDGET TOOL



INCORPORATED  
1835

2024 BUDGET CYCLE

# TABLE OF CONTENTS

Overview.....	3
Milwaukee County Strategic Focus Area.....	4
Instructions.....	5
Racial Equity Budget Tool Questions .....	6
Strategic Focus Area 1: <b>Create Intentional Inclusion</b> .....	6
Strategic Focus Area 2: <b>Bridge the Gap</b> .....	6
Strategic Focus Area 3: <b>Invest in Equity</b> .....	7

## APPENDICES

Appendix A: Glossary.....	8
Appendix B: Frequently Asked Questions .....	9
Appendix C: Resources By Strategic Focus Area .....	14
Appendix D: Public Participation Model .....	15

*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 Milwaukee County's strategic focus areas to help departments and decision makers better understand the pain points and opportunities to advancing the County's vision.

### 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.

## Milwaukee County Strategic Focus Areas

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In 2019, Milwaukee County launched its first strategic plan in 20 years. This 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 have 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

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### 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 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.

If you have questions related to the 2024 REBT, please attend one of the Open Office hours and bring the questions. All persons who may be expected to assist the department director in completing the REBT will be encouraged to participate.

- 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 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 [equityoffice@milwaukeecountywi.gov](mailto:equityoffice@milwaukeecountywi.gov).



## RACIAL EQUITY BUDGET TOOL

Department: Milwaukee County Historical Society

Date Submitted: July 13, 2023

*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?**

The Milwaukee County Historical Society is a small non-profit organization with six full-time employees and four part-time year-round employees. Due to this, and the specialized area of our work, there is little staff turnover and thus limited need for the recruitment of new staff. When it comes to recruitment, job listings are posted in places that are pertinent to the talent we are trying to attract, often field/expertise related job boards and websites, as well as general sites like LinkedIn. We have a non-discrimination policy and consider all applications.

A broader step towards creating a diverse workforce in museums in general, is to remove barriers to internships. Typically, internships are the best source of hands-on learning and experience for people looking to enter the field. However, these are often unpaid, which significantly decreases the number of students and emerging professionals that can take advantage of the experience. MCHS is exploring ways to offer a level of compensation for its interns in order to improve access to these vital opportunities. By working with some universities and other groups we have been able to solicit funds for select interns. MCHS is looking to broaden those pathways as well as exploring self-funding models.

The staff recently underwent accessibility training to ensure that MCHS is a place that is comfortable for all to visit and work. Volunteers and interns were also invited to join the training session. After the session we did an accessibility audit to address any areas in our building that could be potentially hazardous or limiting.

As far as retaining talent, all staff and interns are welcome to seek out professional development opportunities or ways to get involved and engage in the Milwaukee community. MCHS pays for classes and conference attendance, and encourages employees to join working groups, boards, and other professional groups to further their development. In addition, as part of sharing Milwaukee's history with a broad audience, we work with other organizations to engage our community in learning about its collective history.

#### **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?**

MCHS emphasizes professional development opportunities, and the Society includes support for conferences, classes, and other educational opportunities in its budget. Employees are encouraged to identify these opportunities for both personal and professional interests and time is given to participate. This gives employees, interns, and volunteers the opportunity to engage in professional development regardless of position and/or income.

Staff are engaged in community and professional groups, as well as special interest projects throughout Milwaukee and the region. Among these are service on non-profit boards and public-school committees, leading curriculum development that promotes diversity, and participating in panel discussions on diverse topics. These are just some of the ways that our staff participates in furthering their understanding of the many facets of Milwaukee County, including equity and inclusion.

#### **2. 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?**

One of the benefits of having a small staff is that employees are a key component in creating and undertaking major

initiatives. Staff members are involved with changes in organizational structure and in trying to identify funding and resources to support initiatives. In addition to large projects, all employees are engaged in contributing experiences and insights based on visitor interactions to advise how we can most effectively reach a broad audience and serve all of Milwaukee County.

**3. Are you tracking contracts with minority and women-owned business? If yes, please share percentages of each. If not, why not?**

The Society has very few contracts, and those that it holds tend to be highly specific, meaning there are limited vendors. However, most MCHS capital needs go through Milwaukee County processes, which means they meet County standards for minority and women-owned businesses.

**STRATEGIC FOCUS AREA 2: BRIDGE THE GAP**

**4. 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)?**

As a non-profit organization that carries out a state statute for Milwaukee County, the Society is governed by a Board of Directors that currently has 14 members plus two County appointees. A goal of our organization's strategic plan is to ensure that the board represents a diverse group of Milwaukeeans. At this time, 25% of our board are members of color. The board meets on a regular basis to review the Society's activities, including its educational and outreach programs, to assess if we are reaching the broadest audience possible and how to improve our services to the community. Ultimately, the Board informs decisions about our County budget request, including approving the final request.

**5. Describe ways in which racial and economic data were 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.)**

It is important to MCHS to be accessible to all members of the community. Knowing that income disparity and barriers to access are realities in the County, the Society makes it a priority to offer free programs and ease the burden of access. Examples include fee programs like lectures, panel discussions, and family days with free admission to the museum. The Hands on History program places museum educators in Milwaukee County schools eliminating barriers like bussing and the ability to leave school. Additionally, MCHS continues to improve online content, which is free and allows people to access library and museum materials and programs without needing to be in person.

**6. 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?**

The Society is working with the Information Management Services Division on digital records initiatives. This includes both digitized physical records and born-digital records. This collaboration will improve accessibility to vital documents, which will ensure access to the broadest audience, including people of all backgrounds, abilities, and proximity. Patrons often use these records as a key step to secure veterans or social security benefits, among other uses.

**7. 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?**

The initiatives and programs described above are part of MCHS's current budget assuming County funding for 2024 does not decrease from 2023. In addition, key projects to improve access to physical and digital records are funded by the ARPA program. Therefore, there should be no significant consequences resulting from budget changes.

**STRATEGIC FOCUS AREA 3: INVEST IN EQUITY**

**8. 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?**

The Society has not made a request for additional funding for these activities as they are baked into current budget planning. However, if MCHS were to receive additional funding it would use money to support diversifying the museum and archive workspace by offering paid internships, workshops, and other professional development opportunities to students and emerging professionals. As little as \$25,000 would make a significant difference. A reasonable paid internship is \$4,500 per semester. MCHS could offer three one semester internships and still have money for workshops and other programs. Clearly, additional funding would allow the Society to expand the program, reach more people, and potentially ensure its long-term viability.

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

After recently conducting an accessibility audit, MCHS is looking to expand or introduce the following in order to break down communication and accessibility barriers:

- Closed captioning for audio/visual materials
- Virtual versions of exhibits that can be used in-house (on available tablets) and online
- Making translations of exhibit components available in several languages
- Audio descriptions of exhibits, artifacts, and other materials for individuals with vision impairment

Some of this can be produced in-house, but much of it will need to be outsourced. Funding sources for these efforts have not yet been determined, but early steps in the process have begun.





## Appendices

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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.

# 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 are no right answers 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

[GO TO QUESTIONS  
\(REBT FORM\)](#)

**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. 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. Looking ahead to future years, departments will be expected to show how their budgets help Milwaukee County make progress toward its vision.

**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) 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.

**12) 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

**13) 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.

**14) 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.

**14) 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 Performance, Strategy and Budget and the County Board.

# FREQUENTLY ASKED QUESTIONS

(CONTINUED)

## 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, frontline staff).

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

The Office of Equity 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 [equityoffice@milwaukeecountywi.gov](mailto: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

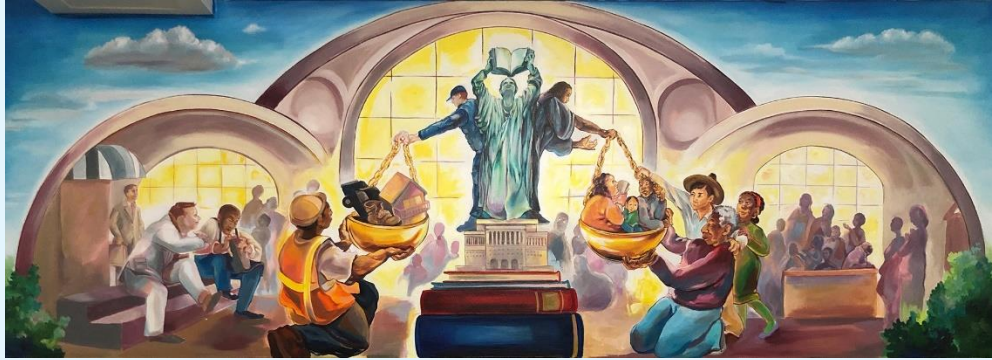
PUBLIC PARTICIPATION MODEL



	<b>INFORM</b> 	<b>CONSULT</b>	<b>INVOLVE</b>	<b>COLLABORATE</b>	<b>EMPOWER/LEAD</b>
<b>PUBLIC PARTICIPATION GOAL</b>	To provide the public with balanced 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.
<b>PROMISE TO THE PUBLIC</b>	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.

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ON THE COVER



“WELCOME TO THE PEOPLE’S HOUSE”

Artist: Tia Richardson

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MILWAUKEE COUNTY  
HEALTH &  
RACIAL EQUITY

**ONE COUNTY  
ONE VISION**

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

[county.milwaukee.gov/vision](https://county.milwaukee.gov/vision)