



FISCAL YEAR 2020 BUDGET EQUITY TOOL



CITY OF SAN ANTONIO
OFFICE OF EQUITY



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City of San Antonio Budget Equity Tool

OVERVIEW

The City of San Antonio **Budget Equity Tool** (BET) includes a set of questions to guide City Departments in assessing how budget requests benefit and/or burden communities, specifically communities of color and low-income communities. Since **Fiscal Year** (FY) 2018, the **City of San Antonio's** (COSA) budget development process intentionally embedded equity as a strategy through the use of a Budget Equity Tool, which represented a shift from rough proportionality to a need- and equity-overall approach.

Equity means that the City's policy-making, service delivery, and distribution of resources account for the different histories, challenges, and needs of the residents in San Antonio. **Racial equity** means eliminating racial disproportionalities so that race can no longer be used to predict success, and increasing the success of all communities. Cities are equitable when all residents – regardless of their race/ethnicity, nativity, gender, income, neighborhood of residence, or other characteristics – are fully able to participate in the city's economic vitality, contribute to the region's readiness for the future, and connect to the region's assets and resources.

The BET process also aligns with the City's goal to advance equity in budgeting, community engagement, and high priority service delivery. Integrating equity into the budget process through a uniform assessment tool is a key strategy in the City of San Antonio's comprehensive and citywide approach to equity. The BET will compliment other efforts to operationalize equity throughout the City, such as Departmental Equity Assessments and 2-Year Equity Action Plans that each City Department will ultimately undertake.

The Office of Equity supports the budgeting for equity effort through the development of the tool itself, facilitating training and providing technical assistance for Departments on BET completion, reviewing completed BETs, and providing feedback to Departments.

City of San Antonio Budget Equity Tool

The City of San Antonio's BET is designed to:

- 1. Identify whether budget requests advance equitable outcomes for residents.**
- 2. Assess the equity impacts of budget decisions for potential burdens and benefits for communities of color and low-income communities.**
- 3. Ensure that programs, projects, plans, and investments help to reduce disparities.**
- 4. Increase community engagement in improvements, reductions and overall budget development.**



BUDGETING FOR EQUITY STRATEGIES

1. Apply an Equity Lens:

Social and racial inequities are not random, natural, or inevitable. For example, in describing inequities in health outcomes across populations, the World Health Organization states that “the unequal distribution of health-damaging experiences is not in any sense a ‘natural’ phenomenon, but the result of a ***toxic combination of poor social policies and programs, unfair economic arrangements, and bad politics.***” Institutional decisions influence inequities. It is therefore essential to use an equity lens (equity thinking) when changing programs, plans, and policies that may perpetuate inequities, and when developing new programs, plans, and policies. Applying an equity lens can help Departments reflect on how budgetary decisions burden or benefit underserved communities, particularly communities of color and low-income communities, and the BET will be the instrument Departments will use to answer specific questions that help get to different solutions.

2. Be Equity Data Driven:

What population-level data is driving your budget decisions? What does this data tell us about how communities of color and low-income communities are faring, and how will we measure progress in these communities? How will we disaggregate data by race and income? If you are proposing a program that will impact a specific geographic area, what are the racial and income demographics of the people who live in that area? The BET will support your Department with the ability to reflect on these questions in making budgetary decisions, with the goal of ensuring high-quality and equitable services for all residents.

3. Strengthen Community Engagement Efforts and Equitable Access:

While it is essential for jurisdictions to adopt equity lens thinking and have equity tools to assist in decision-making, including budget development, this orientation alone is insufficient. Departments need to work in partnership with all communities to achieve meaningful results. City government must be intentional in facilitating community outreach, public engagement, and access to City services for all communities, including communities of color and low-income communities. Increasing community engagement in decision packages (improvements and reductions) and in the overall budget development, is one step to ensure that City services are equitable to all residents.

4. Be Accountable:

Every City Department has an important role in reducing inequities; from fairness in hiring and promotions, providing equitable services for communities throughout the City, facilitating community participation and engagement, or creating greater opportunities in contracting. What role can your Department take in advancing equity? Make a Departmental commitment to advance equity in the City by setting goals and measuring progress. This will help your Department in prioritizing certain programs, plans, and policies reflected in your budget. Decide how and who will track progress towards meeting these goals, and how you will communicate this progress.



BUDGET EQUITY TOOL (BET) INSTRUCTIONS

1. Submit only one BET per Department and for large Departments, submit no more than one BET per division and consolidate them.

The BET should reflect an analysis of the suite of budget decisions per Department, and not include one per improvement or reduction. These decision points should be analyzed as part of the comprehensive effort that your Department is undertaking in addressing equity in programs, plans, and policies. Since Departments are often tasked with cutting their budgets to reflect a reduction from their previous fiscal year's budget, a BET should also include an analysis of how proposed reductions may or may not burden communities of color or low-income communities.

2. The BET will include an analysis of Departments' improvements, reductions and overall budget.

The BET will focus on an equity analysis of decisions for new policies, programs, and plans under consideration, and also the Department's ongoing commitment to equity. Your Department will be asked to identify what considerations were taken into account in the overall budget to maximize equitable outcomes.

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

[Community Information Now](http://viz.cinow.info/) provides maps of various indicators, including race and ethnicity and median household income: <http://viz.cinow.info/>

The [National Equity Atlas](http://nationalequityatlas.org/indicators) developed by PolicyLink and PERE includes citywide data disaggregated by race and income, and examples of available equity indicators include homeownership, wages, unemployment, disconnected youth, school poverty, air pollution, education levels and job requirements, housing burden, car access, neighborhood poverty, asthma, diabetes, etc.: <http://nationalequityatlas.org/indicators>

The [Statistical Atlas](https://statisticalatlas.com/United-States/Overview) is another source of racial and economic disparity data: <https://statisticalatlas.com/United-States/Overview>

Department-specific data that is disaggregated by race and income can also be used to support your Department in determining the impact of proposed policies, plans, and positions, in order to inform budgetary decisions.

4. Use the Office of Equity as a resource.

The Office of Equity will offer BET training to Departments' Fiscal Administrators (DFAs). Additionally, Office of Equity staff is available to answer any questions and provide technical assistance to Departments.



HIGHLIGHTS FROM FISCAL YEAR 2019 BET PROCESS

1. Connection between Structural and Institutional Racism and Racial Inequities

TCI: *“Through deed restrictions, people of color were prohibited from purchasing homes and living in the newer neighborhoods. This resulted in people of color living in older parts of town that were developed with less than adequate street infrastructure.”*

Planning: *“While some areas have felt positive effects of thoughtful investment and incremental development, others have suffered the negative consequences of over-development in a very short period of time. Communities of color historically have experienced more of the negative consequences.”*

NHSD: *“Historic inequities such as redlining resulted in years of disinvestment in infrastructure and physical decline of housing stock in various older neighborhoods.”*

Library: *“Institutional racism is present when a library’s assessment and collection of fines has a disproportionate impact on people of color, who are overrepresented among low-income populations due to the racial/ethnic wealth gap.”*

Development Services: *“The impact of racial and economic segregation has real consequences for our residents, and the contributing factors that create inequity are complex, dynamic, and historic.”*

2. Policies, Programs, and Services with an Equity Lens

Library: The San Antonio Public Library referred to an issue brief by the Racial Equity Alliance on the impact of fines in accessing libraries on low-income communities and communities of color to propose eliminating the imposition and collection of overdue fines for late return of all juvenile and young adult library materials.

Metro Health: Metro Health’s ACEs/Trauma-Informed Care Initiative will focus on children and families living in areas of the community where adverse childhood experiences are most common, including low-income communities and communities of color. Additionally, Metro Health’s Equity Manager works with different divisions to convene an African American Health Disparities Workgroup and a LGBTQIA Health Disparities and Advocacy Group.

Development Services: The Department’s Neighborhood Enhancement Team identifies hardship cases for low-income individuals, elderly, and disabled homeowners in abating the code issues present on their property also provides referrals to other partner agencies to assist these most vulnerable of residents.

Innovation: The Office of Innovation Youth Code Jam is expanding its CivTechSA Externship, which partners with Title I schools that have a high population of students of color. One of the residencies in the CivTechSA Program is improving the Utility Assistance application program, which serves many of the same communities where students live.

Census 2020: The Census 2020 Complete Count Committee and staff will target populations expected to have lower participation rates including communities of color and immigrant communities.



HIGHLIGHTS FROM FISCAL YEAR 2019 BET PROCESS

3. Disaggregating Outcomes by Race and Income

Departments acknowledged that they need to disaggregate data by race and income in order to drive budgetary decisions or determine disparate impact of proposals. Some departments intend to start gathering data to determine benefits or burdens of decision packages.

Library: *"The SAPL is eager to use software to track community engagement which would also track available demographic information via opt-in methods."* SAPL noted data gaps related to race and ethnicity.

Carver Community Center: *"Staff will conduct surveys record patron input and document racial and socioeconomic demographics."*

TCI: *"TCI will further disaggregate the data by race, income, etc. to see if there is any correlation with the types of projects and where the projects are located and the burdens or benefits to different groups."*

Fire: The Fire Department will seek support in analyzing program impact in vulnerable communities. They would like to capture data such as household income, and health care services for specific programs.

NHSD: NHSD will measure success by disaggregating data and performance metrics on questions about affordable housing to ensure an equitable approach. According to the Department, *"An equitable approach, taking into account historic socioeconomic and racial inequities, will ensure that a resident's zip code does not determine the quality or quantity of interaction they can have with the City nor will it impact the ability to preserve and/or develop additional affordable housing in neighborhoods."*

4. Spanish Language Translation

Several departments are currently, or plan on, translating documents and hosting meetings in Spanish to ensure greater participation and engagement with Spanish language speakers.

Planning: *"Translation of the Sub-Area Plans into Spanish will ensure greater access for Spanish language-speakers to the SA Tomorrow Sub-Area Plans and policies intended for growth in each Sub-Area."* The Planning Department will also *"utilize a webpage counter to track number of individuals accessing each Spanish-language e-Plan site."*

World Heritage Office: *"We will have to utilize a variety of strategies in both Spanish and English to reach all levels of the community."*

NHSD: *"When City engagement is primarily conducted in English, Spanish speakers are excluded and further marginalized."*

Historic Preservation: *"We make materials available in Spanish and provide interpretation services at all public meetings hosted by the department."*



BUDGET FOR EQUITY TOOL (BET)

This BET tool aims to ensure that Departments evaluate how projects, programs, plans and proposals may improve equity in service delivery and improve community participation. For each of the following BET questions, please specify how your Department is evaluating the impact of the overall budget and decision points on communities of color and low income communities. For any questions that are not applicable to your Department, please write N/A.

BUDGET DEFINED: For the purpose of this tool, the term budget includes general fund, restricted funds and grants.

STRATEGY ONE: APPLY AN EQUITY LENS TO ASSESS EQUITY IMPACT

This section is intended to assess if Departmental budget decisions considered potential benefits and burdens to communities of color and low-income communities.

1. In what ways has your overall budget been realigned that could positively and negatively impact communities of color and low income communities?
2. Are there funding gaps or limitations in your overall budget that could inhibit your Department's ability to advance racial and economic equity?
3. Identify potential impacts of your proposed reductions or fee changes (if applicable) on communities of color and low-income communities, and explain what strategies you will be using to mitigate those impacts.



STRATEGY TWO: BE EQUITY DATA DRIVEN

This section is intended to assess how equity data indicators informed Departmental budget decisions.

4. Indicate the racial and/or economic inequities experienced by San Antonio residents that could be addressed via specific allocations in the Department's overall budget and improvement requests. Please include the data source(s) that you referred to in identifying racial and/or economic inequities. (See instructions for data source ideas)
5. Within your current budget or service area, describe ways in which racial and economic data was used to prioritize and develop criteria for resource distribution.
6. What additional disaggregated demographic data will your Department collect, track, and evaluate to assess equity impacts in community moving forward, and inform your future budget decisions?



STRATEGY THREE: EQUITABLE COMMUNITY ENGAGEMENT AND ACCESS

This section is intended to assess community engagement in the budget process, whether there was equitable representation and input, and whether the budget supports Departments in authentically engaging with and adequately servicing communities of color and low-income communities.

7. How will your proposed budget build the Department's capacity to engage with, and include, communities of color and low-income communities (for e.g., improved leadership opportunities, advisory committees, boards and commissions, targeted community meetings, stakeholder groups, increased outreach, etc.)? What are the anticipated positive equity outcomes of these allocations?

8. How does your Department allocate funding towards ensuring that public documents, policies, plans, meetings, and hearings are readily accessible to the public, including translation of documents to Spanish and other languages, and ensuring interpretation services are available to the public in all relevant places and programs (such as service desks, service phone lines, open houses, public meetings, etc.)? What is the anticipated equity impact of this allocation?
If tracked as a distinct line item, what dollar amount and percentage of your Department's budget is allocated for translation and interpretation services?

9. How were community members, including communities of color and low-income communities, consulted to identify programming and/or service needs, and how is this reflected in the budget?



APPENDIX: BUDGET EQUITY TOOL GLOSSARY

Please refer to the following definitions in reflecting on and answering the questions in the BET. Feel free to use these terms and concepts in your response.

ADVERSE IMPACTS: Refers to practices or policies that appear neutral but have a discriminatory effect on a protected group.

BUDGET: For the purposes of this tool, the term budget includes general fund, restricted funds and grants.

COMMUNITIES OF COLOR: A term used primarily in the U.S. to describe communities of people who are not identified as white.

COMMUNITY INDICATOR: The means by which we can measure socioeconomic conditions in the community. All community indicators should be disaggregated by race and/or income, if possible.

DISPARATE IMPACTS: Refers to practices or policies that may be considered discriminatory and illegal if they have disproportionate “adverse impact” on persons in a protected class.

EQUITY: Just and fair inclusion into a society in which all, including all racial and ethnic groups, can participate, prosper, and reach their full potential.

EQUITY LENS: A critical thinking approach to undoing racial and economic disparities by evaluating burdens, benefits, and outcomes to underserved communities.

INCLUSION: The action or state of including or of being included within a group or structure. More than simply diversity and numerical representation, inclusion involves authentic and empowered participation and a true sense of belonging.

INSTITUTIONAL RACISM: Policies, practices, and procedures that work better for white people than for people of color, often unintentionally or inadvertently.

INTERSECTIONALITY: An approach largely advanced by women of color, arguing that classifications such as gender, race, class, sexual orientation, nationality, and others cannot be examined in isolation from one another; they interact and intersect in individual’s lives, in society, in social systems, and are mutually constitutive.

LEADING WITH RACE: The recognition that racial inequities across all indicators for success are deep and pervasive, and that in order to have maximum impact, focus and specificity are necessary. When institutions lead with racial equity, they are better equipped to transform conditions impacting other marginalized groups.



BUDGET EQUITY TOOL GLOSSARY (Continued)

PRIVILEGE: Systemic favoring, enriching, valuing, validating, and including of certain identities over others. Individuals cannot “opt out” of systems of privilege; these systems are inherent to the society in which we live.

RACIAL DISPARITY: A significant difference in conditions between a racial group and the white population that is avoidable and unjust.

RACIAL EQUITY: The condition that would be achieved if one’s racial identity no longer predicted, in a statistical sense, how one fares.

RACIAL EQUITY FRAMEWORK: An understanding of the root causes of racial disparities, an analysis of the structures that perpetuate these disparities, and the ability to deploy critical strategies to undoing those structures in order to replace them with structures that produce equitable outcomes.

STRUCTURAL RACISM: A history and current reality of institutional racism across all institutions, combining to create a system that negatively impacts communities of color.

UNDERSERVED: Refers to people and places that historically and currently have not had equitable resources or access to infrastructure, healthy environments, housing choice, etc. Disparities may be recognized in both services and in outcomes.