

GARE California State Convening: Staying the Course for Racial Equity
January 31, 2018; 8:30am-5:30pm
San Francisco

Racial equity budgeting Break-Out 2:15-3:45: *Budgeting for racial equity can be a turning point in the transformation of a government institution. Hear how you can move your jurisdiction further in that direction.*

Julie Nelson, Race Forward & Analilia Garcia, Santa Clara County

Session structure: 10-20 min refresher (intro from facilitators and their jurisdiction work on the respective topic), then 60 min best practice/new tactics (via ~12 min per question below), plus up to 10 min closing out with last thoughts/comments on topic.

1. What is happening?
2. What should be incorporated into GARE curriculum?
3. What models can we export to the rest of the country?
4. What communities are in need of which tools?
5. Does this present the potential to be a Subject Area Working Groups for GARE?

Analilia's Talking Points

- Analilia Garcia, Racial & Health Equity Sr. Manager
- Context-Santa Clara County (SCC) Demographics
 - Almost 2 million people live in Santa Clara County. Of the county's residents, 3% are African American, 34% are Asian/Pacific Islander, 27% are Latino, and 34% are White.
 - More than half of households (58%) have an annual household income greater than \$75,000.
 - Almost half (48%) of residents ages 25 and older and possess at least a college degree.
 - More than half of residents (52%) speak a language other than English at home.
 - More than a third (38%) of residents are foreign-born
 - 15 Cities- from Palo Alto to Gilroy
 - "Healthy and wealthy" on the surface, but with pockets of inequities
- Public Health Department (PHD)
 - ~430 staff
 - 5 branches: Office of the Director; Administration; Healthy Communities; Infectious Disease & Response; Maternal, Child & Family Health
- Santa Clara County Public Health Department (SCCPHD) Strategic Plan 2015
 - GOAL: Advance Racial & Health Equity to Eliminate Health Disparities
 - Obj 1: : Establish Health Equity infrastructure to support the Department's commitment to eliminating health inequities
 - Obj 2: Incorporate evidence based principles of racial and health equity, and social justice into all Public Health activities, policies and programs

- Obj 3: Cultivate and increase public health department partnerships and collaborations to advance health and racial equity
- Because of a department re-organization and the strategic plan's Racial & Health Equity (RHE) priority area: Analilia's position was approved in the FY 2017 Budget Process
- Formal RHE Journey began in 2016
 - Introduction to Julie Nelson & GARE at a BARHII meeting
 - Joined GARE Jan 2016 – team of 9 PHD staff (3 executives, 3 mid-level managers, 3 staff), plus 1 member from the Office of Cultural Competency (County's Exec's Office)
 - Since then, have sent two additional teams: 2017 & 2018
- Through the GARE learning year trainings in 2016, we learned about racial equity work happening nationally, developed a robust action plan and adopted GARE's theory of change: Normalize-Organize-Operationalize
- Organized the internal infrastructure for our RHE work via the establishment of our RHE steering committee, and the formalization of Analilia's position
- Normalized conversations about Race via our Racial & Health Equity Learning Institute
- And were anxious to "try on" the Racial Equity Tools, to Operationalize our work
- We learned about the Budget Equity Tool at a GARE presentation, and heard about the great work Portland Oregon was doing in this area.
- PHD Deputy Director who oversees our Racial & Health Equity work, and is a champion/leader, suggested we pilot test the tool FY 2017/2018 Budget Process:
 - **November 2016:** Adapted Portland's tool (streamlined language/introductory letter)
 - **December 2016:** Executive Team expected to use the tool as part of their budget proposal development
 - **January 2017:** Budget Equity Tool Implementation & TA (Discussion, training, consultation) provided by Aimee Reedy, Deputy Director and Analilia Garcia, RHE Sr. Manager
 - Over a 3-week period, met with the 5 branches. Executives overseeing those branches were encouraged to bring their managers/other staff.
 - We sent the tool in advance, and walked them through it.
 - **Mid-January 2017:** The budget equity tool answers were included as part of write up for the Budget Proposals, which were discussed/reviewed/ranked by the executive team
 - **End of February 2017:** PHD Proposal Submission to County Executive
 - **March-April 2017:** County Executive reviews department proposals, meets with department heads and determines recommended action
 - **April 21, 2017:** Finalize the recommended budget
 - **May 2017:** Budget workshops
 - **June 2017:** Budget hearings to adopt budget
- **County Executive Recommendations** that surfaced from budget process
 - All positions that were requested by PHD were approved

- Specifically, 4 positions to expand Racial & Health Equity work
- **Outcomes/lessons learned**
 - **Tools help exec team to make decisions during prioritization of proposal-** the Racial Equity Tool (RET) helped determine what may or may not go forward—at the program level there were more asks than # of proposals that ended up going forward.
 - **Critically discussing racial implications of our budget proposals**
 - Had never proactively asked ourselves questions about harm/benefits, or our community engagement strategy
 - It helped jump start conversation of how to “operationalize” Racial & Health Equity
 - The process kept RHE front and center
 - The information is at the department level- for users to understand/identify how their budget request intersects with equity
 - Holds us accountable to this work
 - Staff struggled with questions i.e. answered questions broadly vs. proposal focused
 - Important to have community voice/participation in process
 - County does not use the equity tool or lens for budget process—therefore, write-up that went to the County Exec’s Office does not include use of the tool
 - We started in October, it took a while to figure out what managers and exec’s need in terms of TA
 - **Community Engagement: It’s too late to engage community**—perhaps if a request surfaced from an existing/ongoing community engagement effort/strategy, then recommendations from process would be different
 - Staff indicated needing more time to complete the tool i.e. community engagement strategy—how to do this genuinely?
 - Need to engage earlier, often, on-going, via authentic relationships and community needs will surface through those partnerships
 - Need community support to position us in greater probability of getting through the larger budget process? Improved community partnerships that are authentic, that can advocate on the back end in ways we cannot
 - Need to consider maybe on-going work with community i.e violence prevention; STD?
 - Think about it throughout, not just at one point in time
 - How are we doing overall with including stakeholder input in these processes? How can we build in outside input earlier in the budget planning process so that by the time we’re filling this out, we already have it?
 - Some mechanism for accountability if we say we’re going to get community input but haven’t yet. How will we check back to make sure this happened?

- Need training on “community engagement to advance racial equity”
- All budget requests had an internal focus
- Overarching question: is the tool crucial/necessary for all budget needs?
- “Bundling strategy” i.e. Children’s Health Assessment

- **FY 2018/2019 Budget Process**
 - **What was different from 2018 process**
 - Earlier Timeline + Modified the tool, streamlined questions
 - October: FY 19 Budget proposals prioritization criteria and timeline reviewed approved
 - November: Preliminary budget proposal worksheet completed
 - December: Preliminary budget proposals reviewed, ranked and selected for next steps of full budget proposal and costing
 - January 2018: Prioritized proposals drafted
 - Jan 19th: Budget proposal discussed and further prioritized
 - Jan 23th: Budget proposals written, costed
 - **2 positions recommended**
 - **Lessons Learned/Pending questions**
 - Struggled in a good way with the downsides or risks of budget proposals and thinking carefully about them.
 - Some mechanism for accountability if we say we’re going to get community input but haven’t yet. How will we check back to make sure this happened?
 - How are we doing overall with including stakeholder input in these processes? How can we build in outside input earlier in the budget planning process so that by the time we’re filling this out, we already have it?
 - **What’s next?**
 - Ad hoc group to discuss further, developing training on “community engagement to advance racial equity”