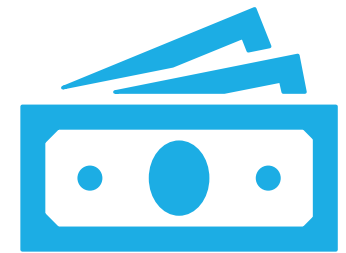


# EQUITY IN BUDGETING TOOL

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Introduction from the Equity in Budgeting Change Team



# OVERVIEW

Why we are here:

- As part of the 2022 Budget process, we are asking all departments to respond to the Port's first Equity in Budgeting Tool, a four-question worksheet.

Today's training will cover:

1. Brief introduction to "Budgeting with an Equity lens".
2. Guidelines to consider when answering these questions.
3. Next steps for Equity and Budgeting.
4. The questions – the Equity in Budgeting Tool.
5. Frequently asked questions and concerns.
6. Audience questions and contact information.



# AN INTRODUCTION TO BUDGETING WITH AN EQUITY LENS

This is the first step in applying equity to our budgeting process:



- **We believe budgeting and funding considerations will aid in achieving the Port's equity goals long-term.**
  - The Port defines Equity as: the fair treatment, access, opportunity, and advancement for all people while striving to identify and eliminate barriers that have prevented the full participation of communities historically oppressed. Improving equity involves increasing justice and fairness with the procedures and processes of institutions or systems and a fair, intentional distribution of resources.
- **For this year, our goal is information gathering.**
  - We will use a 4 question Budgeting Equity Tool to establish a baseline.
  - Responses to these questions will be used to identify opportunities and guide future training.
  - F&B will collect the responses as a part of the budget review package that each department will complete and submit.





## 4 GUIDELINES TO CONSIDER WHEN ANSWERING THE BUDGETING EQUITY TOOL QUESTIONS

# A BUDGET IS A MORAL DOCUMENT AS WELL AS A FINANCIAL ONE

Our budget reflects our priorities and values both to the community and ourselves:

- **How are we using Port resources?**
  - What is the opportunity cost of that choice? In other words, what are we choosing not to spend our time and money on?
- **How are we communicating with the community?**
  - What does our community engagement look like during the budget process? Is it equitable and inclusive?
  - Is our budget accessible to everyone in the community?

The Port's mission is to *promote economic opportunity and quality of life*. Our goal is to *become a model for equity, diversity and inclusion*. Our budget should reflect that.



# THIS IS A LEARNING OPPORTUNITY, NOT A TEST

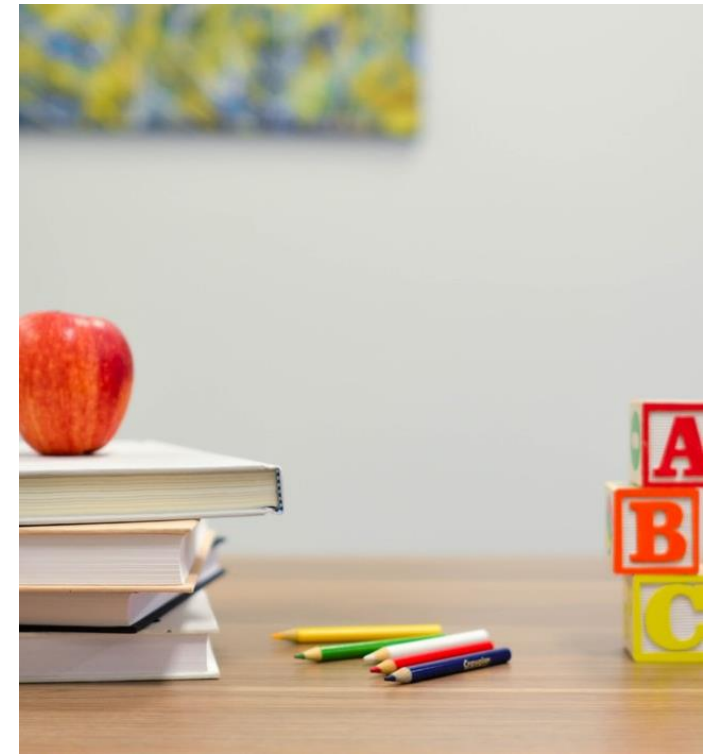
Think of these questions as an introduction to equity in budgeting, we aren't expecting anyone to be an expert yet.

## **What these questions are for:**

- Introducing departments to the Budgeting Equity Tool.
- Discovering ways, the Port is already using an equity lens during the budgeting process.
- Finding opportunities to help address racial inequities, economic disparities, and other forms of discrimination or exclusion through the Port's budget.
- To help us learn from you – how can we adapt our equity in budgeting efforts and what trainings might make this work more effective in the future?

## **What these questions are not for:**

- Judging or grading departments current efforts or responses – you will not get in trouble for saying “no” or “I don't understand”, in fact those are helpful responses.
- Checking a box - this is the first step of a much greater effort to incorporate equity and inclusion into our budgeting process.



# EQUITY AND INCLUSION APPLIES TO ALL DEPARTMENTS, NOT JUST THOSE WITH DIRECT COMMUNITY ENGAGEMENT



We encourage you to think outside the box when answering these questions, it may not be immediately obvious how your department can apply an equity lens to its budgeting process.

Some tips:

- **Think about how decisions you make influence the direction of the Port.**
  - Ex. You work in Internal Audit and aren't sure how your department can consider equity. What about adding an equity component to your audit reports? Your department may be in a unique position to advise on how to effectively support underprivileged communities using your legal and procedural expertise. Maybe by requesting an additional FTE your department could provide "equity audits" to help departments better serve the community while still avoiding compliance risk.
- **Try second-level thinking. Maybe you don't interact with the community directly but a department you support does.**
  - Ex. You work in Business Intelligence, how can data reports have any impact on equity? What data do you have access to? Can you start including some type of demographic information in your quarterly snapshots? In the future that could help the manager of a community program identify a disparity they can help address.
- **Start small – any effort is better than no effort.**



# BE SPECIFIC

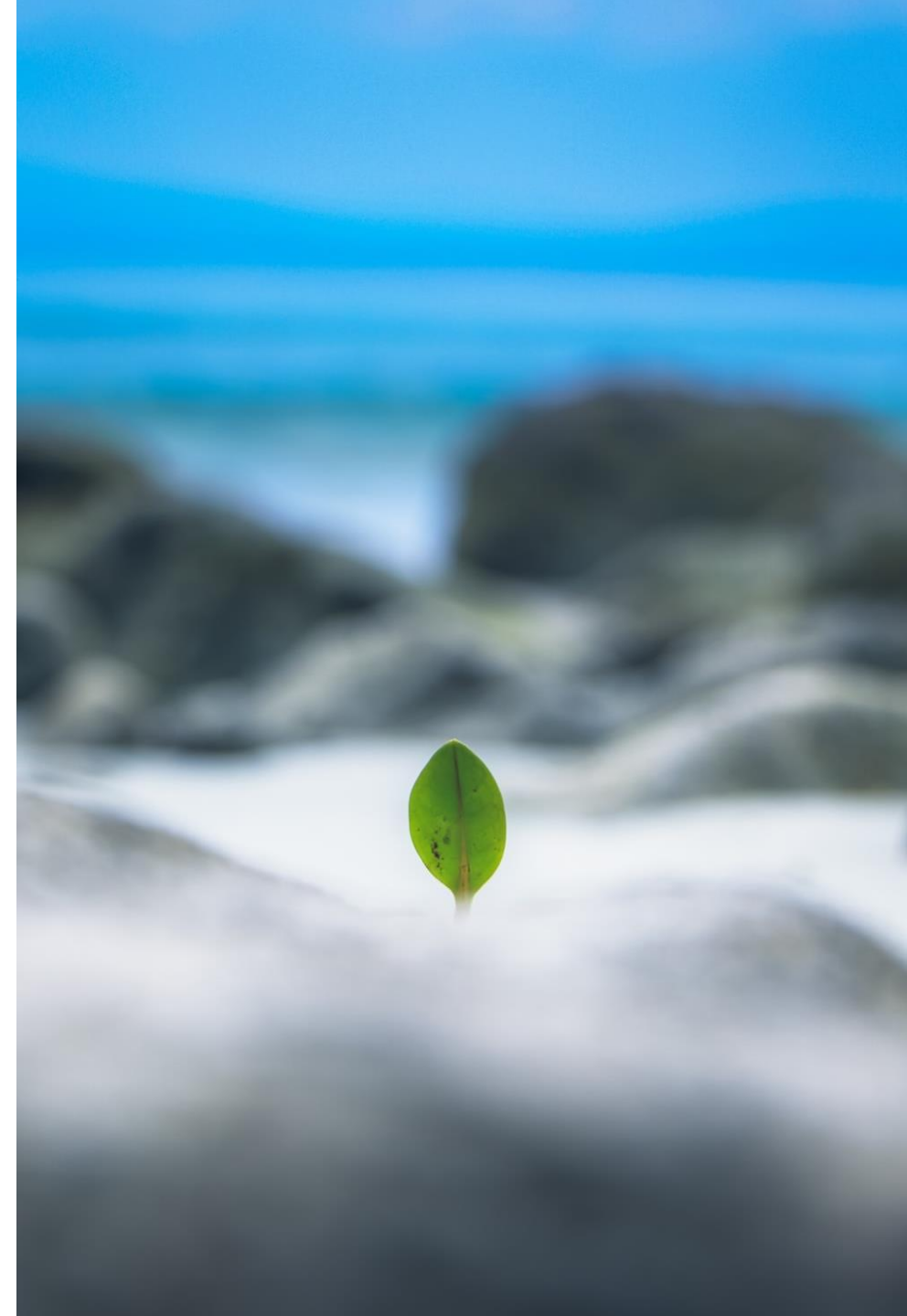
“Equity” can sound like a broad term. Let’s identify the inequity or disparity we are addressing and make solutions as clear as possible.

- **Which response do you think is more helpful:**

1. We plan to attend more diversity and inclusion trainings as a department.
2. Our department will create a performance goal for each employee to attend at least 2 equity, diversity, and inclusion related trainings per year.

Quantitative (data-driven) responses are highly encouraged.

Being specific and succinct also helps us when reviewing these responses. We need your help to learn about opportunities your department may have regarding equity and inclusion.





# NEXT STEPS:

Answer the Budgeting Equity Tool questions as part of your budget process.

- Consider the 4 guidelines as you fill out the questions:
  1. A budget is a moral document
  2. This is just an introduction, not a test
  3. Think outside the box – an equity lens can be applied to all departments
  4. Be specific – identify the inequity or disparity you wish to address and how you will address it.

F&B will collect the responses as a part of the budget review package that each department will complete and submit.



# THE QUESTIONS:

1. Have you considered the impacts on equity, diversity and inclusion (EDI) in the programs and initiatives included in your baseline budget? In thinking about this, consider external stakeholders and communities that may be positively or negatively affected by your programs as well as internal equity considerations.
2. Does your Department's current budget advance the Port's Century Agenda EDI goals? If yes, please describe how.
3. Are there specific areas or programs your Department would like to add to the 2022 budget to advance equity considerations? If yes, describe the specific area(s) and how much funding would be needed.
4. Do you think your team members would benefit from additional training in "How to include Equity in your budgeting process"?

# ADDRESSING POSSIBLE QUESTIONS AND CONCERNS

My 2022 budget is still limited. How can I apply an equity lens or ask for additional funding when my budget is already constrained?

- These questions are not a specific budget request. Try to think about how they could apply to your current budget or what you might be able to do with additional resources in the future as opposed to a new budget request for 2022.

These questions seem very broad. How can I make them specific to my department?

- The questions are intentionally broad so they apply to the whole Port. We encourage you to make them as specific to your department and your business as possible.

How will these responses be used? Who is going to see them?

- These responses will mostly be used as a learning opportunity. We want to find out what ways equity is already being applied and what opportunities or areas of improvement we may have across the Port from a budgeting and financial standpoint. The responses will be summarized and shared with the Executive Leadership Team, Office of Equity and Diversity, and possibly others it may benefit such as the Change Team.

We appreciate your time and effort in answering these questions. Applying equity to budgeting is going to be an iterative process, but the goal for this year is just to start the conversation.





# HAVE ADDITIONAL QUESTIONS? REACH OUT TO US:

## **Equity in Budgeting Change Team Members**

- Ian Burke
- Marin Burnett
- Brian Kao
- Dave Kleiber
- Sharon McAllister
- Terrence Moody
- Linda Nelson



Thank you, Vanessa Allmon, for all your support and guidance!





# APPENDIX

# HOW WILL THE BUDGET EQUITY TOOL RESPONSES ADD VALUE TO EQUITY BUDGETING?

- The Executive team will review and discuss the information as part of departments budget review to learn more about the opportunities/challenges that departments identified.
- Potentially summarize and share the info with other team members, such as EDI and the Change Team, to make them more informed.
- Use the information from the questions to make some short-term budget and/or long-term strategic decisions.