

FY 25-26 Budget Equity Statement Review: Preliminary Findings, Recommendations and Engagement Work Plan

Background

In March 2025, the Office of Racial Equity and Social Justice (ORESJ) coordinated with the County Administrator's Office to review budget equity statements for the second year. On March 14, 2025, ORESJ shared a communication with departments that for the second year ORESJ would review budget statements and provide feedback in writing, offer Budget Hearing prep support, and request meetings with each department to discuss findings from the budget narrative review and preliminary analysis. To guide the written feedback, ORESJ developed a list of categories and guiding questions (see below) to establish shared language and facilitate discussion, learning, standards, and best practices around equity assessments.

In the March 14, 2025 communication, ORESJ also introduced the Budget Equity Tool Primer to share the purpose, objectives and potential timeline to embed the use of a Budget Equity Tool (BET) into the annual budget process for FY 27-28. The tool would be co-designed and tested with a pilot cohort of six departments during FY 26-27.

More than a compliance task, the BET is a structured decision-making framework that supports departments in aligning their internal practices, community engagement, and resource allocations with the County's equity values. Through the BET, departments can better assess impact, plan strategically, and budget in ways that close gaps and build trust with communities.

FY 25-26 Budget Equity Review Findings

After the complete review of FY 25-26 Budget Equity Statements, we identified promising practices, challenges and opportunities to advance structural equity. ORESJ's review included analysis across five criteria: Community Engagement, Data, Staff & Accountability, Budget Constraints & Equity Challenges, and Budgeting to Advance Equity.

The guiding questions for the review criteria were as follows:

1. **Community Engagement** – How has the community shaped your budget priorities, and what accountability measures ensure their input drives resource allocation?
2. **Data Collection & Use** – What data will you collect (qualitative and quantitative), and how will it inform equity outcomes and future budget decisions?
3. **Staff & Accountability** – Who is responsible for implementing equity work, and how will leadership ensure workforce equity and accountability?
4. **Budget Constraints & Equity Challenges** – What funding limitations exist, and how is your department mitigating their impact on marginalized communities?

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5. **Using Budgeting to Advance Equity** – How is your department using budget decisions to actively advance racial equity?

Community Engagement

Several departments uplifted community engagement as a valuable practice, especially those offering direct services to Contra Costa residents in vulnerable circumstances. Overall, ORESJ noted increased efforts in community engagement through outreach events, advisory boards, and partnerships with community-based organizations (CBOs). While those engagement opportunities appear widespread, ORESJ noted an absence of specific examples illustrating how community input directly influenced a department's budget priorities or resource allocation. In most instances, engagement seems to be more consultative than collaborative.

Data Collection & Use

Multiple departments described the ways in which their teams stratify data by race, income, age, gender identity, sexual orientation, and other identity markers and publish publicly accessible dashboards. These departments are collecting and leveraging disaggregated demographic data and utilizing GIS mapping to ensure resources are allocated equitably. Across departments, current practices in data collection and analysis reveal a primary focus on quantitative data. In many cases, the budget equity statements lacked clarity as to how this information will guide future decisions or address equity gaps. There is an opportunity to increase the use of qualitative data methods, such as focus groups, community-led research, focus groups, or storytelling to capture a fuller understanding of community-level impacts.

Staff & Accountability

Without staffing and accountability, even well-funded and well-intentioned initiatives will fail to close gaps and sustain change. A few county departments have identified and assigned staff who are responsible for leading equity initiatives throughout the department, with Health having the most robust Equity Team. Additionally, a small number of departments have formed internal equity committees or workgroups. Unfortunately, it appeared that most lack clear goals and accountability frameworks. Equity work often appears as an add-on, rather than embedded into core job functions and priorities. Several departments have provided anti-bias and anti-racism training, building their ability to operationalize practices across the department.

Budget Constraints & Equity Challenges

Acknowledging challenges to budgets can be a strength, in that it can encourage solution-based thinking, mobilization and acquisition of resources. In the budget equity statements, several departments cited the anticipation of funding cuts in a context where there is already limited funding and staffing constraints. Several departments described their strategic use of Measure X investments to address the needs of vulnerable community members. Others discussed engaging in public-private partnerships to augment and extend services. However, there is

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limited discussion that explicitly enumerates how budget constraints differentially impact marginalized populations or the very services tailored to reduce inequitable disparities. ORESJ also encourages departments to share how equity priorities were maintained (or adjusted) amid financial limitations, enabling shared learning and innovation.

Using Budgeting to Advance Equity

Several departments discuss the ways in which they prioritize resources to better serve historically marginalized and excluded communities. Examples included utilizing resources to hire and retain bilingual staff, ensure services are ADA-compliant, outreach to communities that have been disenfranchised, and embed equity into capital projects and operational plans. Many statements lacked plans for *language justice*, particularly for communities beyond Spanish and Tagalog. Additionally, there is limited discussion of the investment in accessible engagement materials and outreach for residents with disabilities. While some departments show a strong alignment between equity goals and funding (e.g. targeted programs for vulnerable populations), there is room for others to clearly demonstrate how budget decisions are used proactively to address racial disparities.

These findings open the opportunity to work with departments further to ground truth the real needs and programmatic and structural aspects of the work that can be strengthened or considered from an equity lens.

FY 25-26 Budget Equity Review Recommendations

At May 2025 Equity Committee meeting, ORESJ shared preliminary reflections and recommendations related to our review of budget equity statements:

1. Integrate Office of Racial Equity and Social Justice in Budget Development
2. Align Budget Narratives with Equity Outcomes
3. Measure and Communicate Impact Through Budget Statements
4. Adopt Meaningful Community-Centered Engagement Frameworks
5. Embed Accountability Structures for Equity
6. Provide Training and Capacity Building
7. Engage in Continuous Learning and Iteration

To build upon these reflections from May 2025, ORESJ recommends the following:

- Adopt and embed culturally-responsive, multilingual outreach and engagement standards. Adopt community engagement frameworks that uplift liberatory design principles.
- Standardize data collection and data disaggregation protocols across departments.

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- Enhance qualitative data collection. Collect stories, community narratives, and lived experience data through focus groups, open ended survey questions, and/or interviews. Pair that data with quantitative metrics to better reflect complex equity challenges.
- Designate equity leads. Each department should designate a staff member or team to be accountable for equity implementation, with duties tied to performance evaluations.
- Demonstrate commitment from county leaders. Department heads and leadership teams must visibly champion equity work and model accountability in resourcing and prioritization.
- Build internal capacity. Provide ongoing training in equity principles, cultural humility, and data equity. Encourage peer learning between departments advancing innovative practices.
- Institutionalize equity impact statements. Require equity impact statements on all proposed cuts, new programs and new investments.
- Create equity-centered budgeting templates. Standardize the use of tools (like equity impact assessments) in budget development and justification processes.
- Remove barriers to engagement. Move beyond translation to inclusive practices for community members who prefer a language other than English and for residents with various abilities and needs.

Budget Equity Progress Update and Department Engagement

By connecting the preliminary findings from Budget Equity Statements with follow-up conversations and collaborative goal setting, ORESJ aims to move to measurable, systemic change. After providing written feedback to each department, ORESJ staff reached out to request one-on-one meetings with department leaders. ORESJ is currently partnering with receptive departments to develop and/or support equity goals for FY 25-26 and build internal accountability loops.

From May - June 2025, ORESJ staff have met or/are meeting with the following departments related to their budget equity statements: *Agriculture, Clerk Recorder-Elections, Contra Costa County Fire Protection District, Contra Costa Health, County Counsel, Department of Conservation and Development, Library, Public Works, and Risk Management*. ORESJ will continue to meet with receptive departments to set and track equity goals and success metrics.

ORESJ understands that the budget equity work is deeply interconnected with several other core initiatives that support equity and accountability. For those departments already engaging in deep collaboration with ORESJ, we did not seek to recreate new goals, but rather to focus attention on existing initiatives that have already generated momentum.

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Racial Justice Oversight Board is space in which community leaders convene alongside the County's criminal justice partners – District Attorney, Probation, Public Defender and the Sheriff – to establish goals and implement initiatives to reduce racial disparities.

Implementation of the **African American Holistic Wellness and Resource Hub** - County departments are committed and deeply engaged in the planning stage – Contra Costa Health, Employment and Human Services, Library, Probation and the Public Defender. These departments are critical partners in addressing the public health crisis facing the most vulnerable and underserved African American communities in the county.

In February 2025, ORESJ partnered with the Animal Services leadership team to implement a one-day **Equity and Belonging training** for the senior leadership (management) team within the department.

ORESJ meets monthly with the County Librarian and the Library's Equity Lead to provide thought-partnership and guidance as the department creates and implements a **Racial Equity Action Plan**. ORESJ Co-directors have facilitated workshops with the department's Anti-Racism Task Team.

ORESJ is a member of the Stewardship Team of the **Contra Costa Accountable Communities for Health** led by Contra Costa Health's Equity Team. This collaborative has hosted a convening of equity practitioners and will soon roll out capacity building, learning opportunities to further the goal of healing, bridging and building.

ORESJ is partnering with the Human Resources Professional and Organizational Development (HRPOD) Team to create and scale a countywide **Anti-Bias Training**. HRPOD developed and has implemented an Implicit Bias training that has reached hundreds of county staff, and they are available as a resource to all departments.

ORESJ seeks to further streamline the budget equity process with these current initiatives. Advancing budget equity is not separate from this work. ORESJ will continue to share updates about the outcomes achieved through the aforementioned equity collaborations, and how departments are allocating resources based on how well these initiatives close equity gaps. ORESJ will provide the Equity Committee with quarterly updates that highlight the departments that are engaging in this work, and the progress toward achieving goals.

Budget Equity Next Steps

Key Informant Interviews

In partnership with Budget Justice Coalition, ORESJ is engaged in key informant interviews with seasoned equity leaders—including **Heather Jue Northover (Los Angeles County Anti-Racism**

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Initiative), Michael Russo (Catalyst California), Kim Desmond (Former San Diego County Race and Equity Chief), and Andrea Aguiar (City of San Jose). These equity champions have offered critical insights into the real-world application, challenges, and transformative potential of embedding racial equity into public budgeting. These conversations have deepened our understanding of how Budget Equity Tools move from theory to practice—shaping decision-making, driving accountability, and influencing resource distribution. By learning from jurisdictions that have pioneered this work, we can apply tested strategies, avoid common pitfalls, and ensure Contra Costa’s approach is grounded in community-centered, system-changing practices that meaningfully advance equity.

Through this review process, the ORESJ team has gleaned important lessons. First, departments need **clearer criteria, tools and baselines** for defining and measuring equity efforts. ORESJ can contribute to the county’s capacity to advance equity in tangible ways. ORESJ can build capacity of departments through trainings, webinars and skills development opportunities. We can create guides and tools to encourage the use of community-centered practices. Additionally, ORESJ learned that without investment in infrastructure and internal accountability, departments may view equity efforts as symbolic. Finally, this work will take consistent practice and requires a collective comfort with and commitment to continuous learning.

As we continue to move towards a countywide rollout of the Budget Equity Tool, these recommendations can guide implementation, shape capacity-building efforts, and help departments align fiscal responsibility with racial, economic and social justice. This report presents a set of recommendations that build on current efforts and offer strategic guidance for strengthening the County’s equity infrastructure.