

# Metro Budget Equity Assessment Tool

The Metro Budget Equity Assessment Tool (MBEAT) is a set of questions to guide Metro staff in considering racial and social equity explicitly in its budgetary decisions. Metro believes that access to opportunity should be at the center of decision-making around public investments and services. This is especially true for transportation, which is an essential lever to enabling that access. Vast disparities among neighborhoods and individuals in LA County limit this access, making opportunity harder to reach for some, whether it's jobs, housing, education, health care, safe environments or other essential tenets of thriving, vibrant communities. Transportation infrastructure, programs, and service investments must be targeted toward those with the greatest mobility needs first, in order to improve access to opportunity for all. The MBEAT is designed to help Metro center equity in its decision-making.

## What is "Equity"?

Equity is both an outcome and a process to address racial, socioeconomic, and gender disparities, to ensure fair and just access – with respect to where you begin and your capacity to improve from that starting point – to opportunities, including jobs, housing, education, mobility options, and healthier communities. It is achieved when one's outcomes in life are not predetermined, in a statistical or experiential sense, on their racial, economic, or social identities. It requires community informed and needs-based provision, implementation, and impact of services, programs, and policies that reduce and ultimately prevent disparities.

Equity means that Metro's service delivery, project delivery, policymaking, and distribution of resources account for the different histories, challenges, and needs of communities across Los Angeles County; it is what we are striving towards.

## Why use the Metro Budget Equity Assessment Tool?

Use of the MBEAT can help develop strategies and actions, through budgetary decisions, that reduce, and eventually eliminate, racial and socioeconomic inequities and improve access to opportunities for all groups. Understanding the potential impacts of our decisions for those faring the worse, will enable us to improve conditions for all of our customers, front-line Metro family, and the broader Los Angeles County community. MBEAT questions help staff apply an equity lens as they allocate existing and future resources to meet the diverse needs of those who live, work, and play in Los Angeles County. This represents a shift from an equality-based approach to a more strategic equity-based application and helps operationalize Metro's Equity Platform.

## How should you use the MBEAT?

- ***Please read this entire document.***
- Utilize the MBEAT as you prepare your annual budget request.
- ***Complete part one of the MBEAT for all budgetary adjustment requests.*** Budgetary adjustments are budgetary changes including new, expanded scope, or reduced budgetary requests. This excludes requests for ongoing approved budgets or requests with standardized adjustments, such as cost of living adjustments.
- ***Complete part two of the MBEAT for your Department's overall budget.***
- All questions should be answered to the best extent possible before submitting budget requests.
- Consult with your Department's Equity Liaison(s) for assistance.
- For additional questions, email [equityandrace@metro.net](mailto:equityandrace@metro.net).



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## PART ONE: Budgetary Adjustment

**Fiscal Year:** Click or tap here to enter text.

**Department:** Click or tap here to enter text.

**Unit or Program** Click or tap here to enter text.

**FY Budget Request:** Click or tap here to enter text.

**Cost Center:** Click or tap here to enter text.

**Project number:** Click or tap here to enter text.

**Account Number:** Click or tap here to enter text.

**Life of Project Budget:** Click or tap here to enter text.

**Who completed the MBEAT? (Staff Names):** Click or tap here to enter text.

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**Is this board directed program or project?** Yes  No

**Project Name:** Click or tap here to enter text.

**Project Scope:** Click or tap here to enter text.

**1. Which area(s), neighborhood(s), or employees will the budgetary adjustment, or the subject of the budgetary adjustment, impact? For area(s) or neighborhood(s), are they Equity Focus Communities (see the map on page 6)?**

**2. Does your budgetary adjustment directly benefit or potentially cause harm or negative impact to one or more of the following groups?** Negative impacts may be unintended and impact some more than others. Consider unique needs and who might have difficulty accessing the service, program, or project, including cost barriers, physical access, safety, language access, etc.

Population Impacted	No Specific Impact	Potential Positive Impact	Potential Negative Impact
Black, Indigenous, or People of Color (Specify when discussing impact.)			
People with Low Incomes (Avg. HH incomes < \$35K)			
People with Limited English Proficiency			
People with Disabilities			
Minority or Women Owned Businesses, DBEs, or DVBEs			
Other underrepresented groups facing inequities.			

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Ex: Older Adults, LGBTQ+, Women, etc. (Specify when discussing impact.)			
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**3. What considerations were taken into account to maximize equity in this request? Be specific.**

Ex: Racial or social disparities data, inequitable service levels, concerns from a high need community, potential to meet an identified community need, potential to support or engage with a high need community, etc. This information may be anecdotal or incomplete but specify what you considered.

**4. What steps will you take to mitigate any potential harm or negative impact caused by this request? Potential Mitigation Steps: 1) identify the equity challenge and 2) reprioritize to address the equity challenge 3) promote an equity connection - what other areas did you make decision to promote equity or 4) address the concerns and provide mitigations. Please include specific strategies. Ex: funding redistribution, service or program reprioritization, related program coordinating, coordination with other services, targeted outreach, etc.**

**5. How will you monitor impacts to the affected populations and evaluate outcomes over time?**

Identify specific metrics, qualitative (surveys, focus groups, etc.) or quantitative (program participants, number of riders, etc.), disaggregate by race, income, language access, or other demographics as relevant to monitor disparity levels.

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## PART TWO: Department Budget Proposal:

**Department:** Click or tap here to enter text.

**Fiscal Year:** Click or tap here to enter text.

**Total Departmental Budget:** Click or tap here to enter text.

**Who completed the MBEAT? (Staff Names):** Click or tap here to enter text.




- 1. How will the proposed budget build the Department’s capacity to engage with and include communities of color, low-income communities, and others most impacted by inequities?** Specify how much funding is allocated to support specific activities including, but not limited to, community engagement (meetings, events, surveys, committees, focus groups, etc.), live speech captioning and oral translation at meetings, the translation of written documents, and ensuring public documents, policies, plans, and meetings are readily accessible to the public.
- 2. How will your overall budget for the next fiscal year be realigned in targeted ways to advance equity and support a diverse and inclusive workforce?** This may include shifts relating to programmatic commitments that are intended to reduce or eliminate disparities experienced by communities of color, low-income communities, or other experiencing inequities; and/or staff time allocations for the purposes of advancing diversity, equity, and inclusion, including, but not limited to, staff participation in internal or external trainings, conferences, or book clubs. Specify funding and/or staff time allocated to these activities.
- 3. Are there recurring funding gaps or limitations in your overall budget that could inhibit your Department’s ability to advance racial and social equity?** Consider funding limitations beyond your control, staff capacity, time constraints, and recognition that racial and socioeconomic disparities are vast, deep, and influenced by many factors beyond Metro's control.

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4. **Does your Department have, collect, or track the disaggregated demographic data your Department needs to evaluate equity impacts in the community moving forward, and to inform your future budget decisions?** If so, please give examples. If not, what data is needed to help evaluate equity impacts and how will you obtain the data?

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## Equity Focus Communities Map

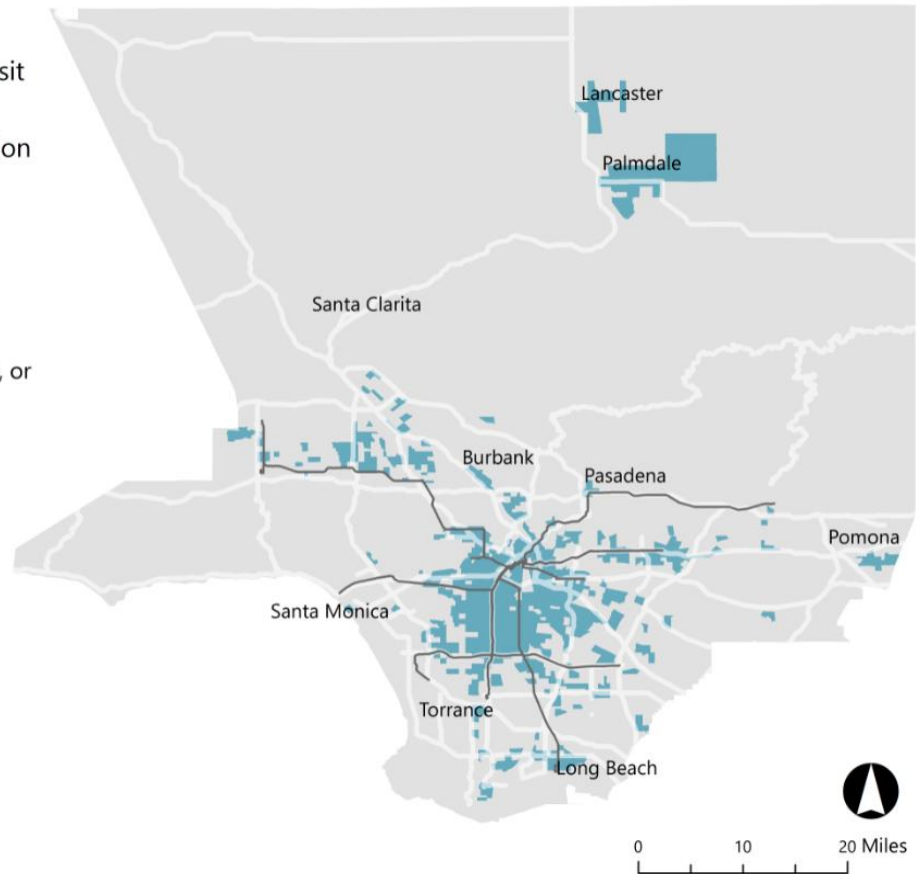
-  Highways
-  Fixed guideway transit
-  EFC Communities  
30% of LAC Population

Census Tract Thresholds

- > **40%** Low Income
- > **80%** Non-white
- > **10%** Zero Car

\*Thresholds are based on:

- 1) Non-white AND Low Income, or
- 2) Low Income AND Zero Car



**Acknowledgements:** This tool was developed with inspiration and borrowing from the “COVID-19 Equity Framework and Rapid Response Tool” from the City of San Antonio Office of Equity and the “EOC Equity Framework” from the City of Denver.

## Metro Budget Equity Assessment Tool

For internal purposes only.

	Status	Comment
<input type="checkbox"/>	Reviewed, no concerns	
<input type="checkbox"/>	Reviewed, need more information.	
<input type="checkbox"/>	Reviewed, pull for further discussion.	