



The Budget Equity Tool

Office of Diversity, Equity, and Inclusion
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Introduction to the Budget Equity Tool

The Office of Diversity, Equity, and Inclusion’s **Budget Equity Tool** (BET) is a way to integrate equity into departmental policies, practices, and program developments and their corresponding budget needs. This tool can help departments develop targeted and data-driven strategies and practices that promote racial and economic equity and improve service performance for every Nashvillian. The tool is designed to determine whether budget allocations advance equitable outcomes for residents and Metro employees, measure the impact of budget decisions in terms of burdens or benefits for specific communities, and improve performance and service delivery for each department.

Equity is a key guiding principle for the overall budgeting process. Equity within government refers to fair practices and policies that ensure everyone has access to the same opportunities while acknowledging and addressing past and present structural inequalities. Equity and *equality* are distinct. Equality means treating everyone as if their experiences are the same. Equity acknowledges and addresses past and present structural inequities that advantage some over others. Nashville is a uniquely diverse city. To fully realize the positive impact of this diversity, Metro Nashville must continuously reassess and adjust its equity and inclusion efforts.

The BET is the first step in integrating equity in the budget decision making process and one of many ways departments can work with the Office of DEI. Our office facilitates this process through development of the tool, training, and technical assistance for its completion, reviewal of each department’s completed BET, and subsequent feedback.

The BET is a set of three strategies and corresponding questions that will guide departments to identify and articulate their equity priorities and how to implement them. The BET asks each department to analyze budget decisions and identify comprehensive ways departments can prioritize equity through these strategies.

Budget Equity Tool Strategies

Strategy One
Adopt an Equity Lens

Strategy Two
Be Data-driven

Strategy Three
**Promote Assessment and
Accountability**

Budget Equity Strategies

1. Adopt an Equity Lens

This first strategy evaluates if budget decisions and modifications anticipate any potential burdens or benefits to historically underserved communities. These communities include populations who share a particular characteristic and geographic communities who have been systematically denied a full opportunity to participate in any part of our city's economic, social, and civic life. Applying an equity lens to the budget process requires departments to evaluate how specific groups gain or face burdens from the benefits or consequences that budget modifications will provide. These changes can affect both the residents who utilize a department's services, the contractors or outside stakeholders departments might work with, or staff within a department. For each question, consider how budget modifications will advance equity or can be enhanced with an equity lens.

2. Be Data-driven

When applied through an equity lens, a data-driven approach will specifically utilize population-level data and demographic and economic indicators to understand how budget decisions impact different parts of the county. Each department should identify the necessary data and collection plan to support your department's equity goals. Disaggregated data (data that looks at separate population groups) and spatial data are the most powerful utilities in understanding which neighborhoods, geographic areas, populations, or employees are most impacted by the budget. Proper use of qualitative data—focus groups, interviews, surveys, or observations—can provide deeper contextual insights into the impact of budget modifications. A data-driven approach will help departments ensure high-quality and equitable services for all residents.

3. Promote Assessment and Accountability

The final strategy requires departments to develop a way to evaluate if equity goals are met or progress is being made. An attainable equity plan will build off the other two strategies and provide a framework for accurate and manageable assessment. Each department needs to set concrete milestones and measure progress on department equity goals. The budget is an opportunity to state the department's values and priorities. Proper assessment and subsequent accountability will help departments adhere to these values and realize departmental priorities.

Instructions

1. Complete the Budget Equity Tool by addressing each of the three strategies in your response.

Each department will submit one tool. A complete tool will answer all four questions and focus on budget modifications to the operating budget for the upcoming fiscal year. **Please restrict your responses to the upcoming fiscal year's budget modifications.** Any budget modifications that do not address questions 2-4 should be noted in Question 5. Each tool must be submitted to the [submission portal](#). All JIS users should submit the tool by email using [this link](#). If you have any issues submitting the tool, please contact [Michelle Boudreaux](#). The completed tool should be submitted by the date budget modifications **are due** in the Office of Management and Budget's NORBeRT system.

2. Contact the Office of Diversity, Equity, and Inclusion for any questions related to the BET.

Departments need to contact the Office of Diversity, Equity, and Inclusion if they have any questions about the BET. We will be reviewing each tool and making recommendations on adjustments or resubmissions. Contact information is available on page 15.

3. Utilize internal and external data sources to utilize population-level data.

Department-specific and disaggregated data can guide each department in determining the impact of proposed policies, plans, and budgetary decisions. Below is a list of internal and external data sources.

Metro sources:

[Davidson County Demographic Atlas](#)

[DEI Office Equity Dashboards](#)

[Nashville Open Data Portal](#)

External sources:

[American Community Survey](#)

[Social Vulnerability Index](#)

[US Census Bureau Data Equity Tools](#)

[National Equity Atlas](#)

[Racial Equity GIS Hub](#)

[PolicyMap](#)

[City Health Dashboard](#)

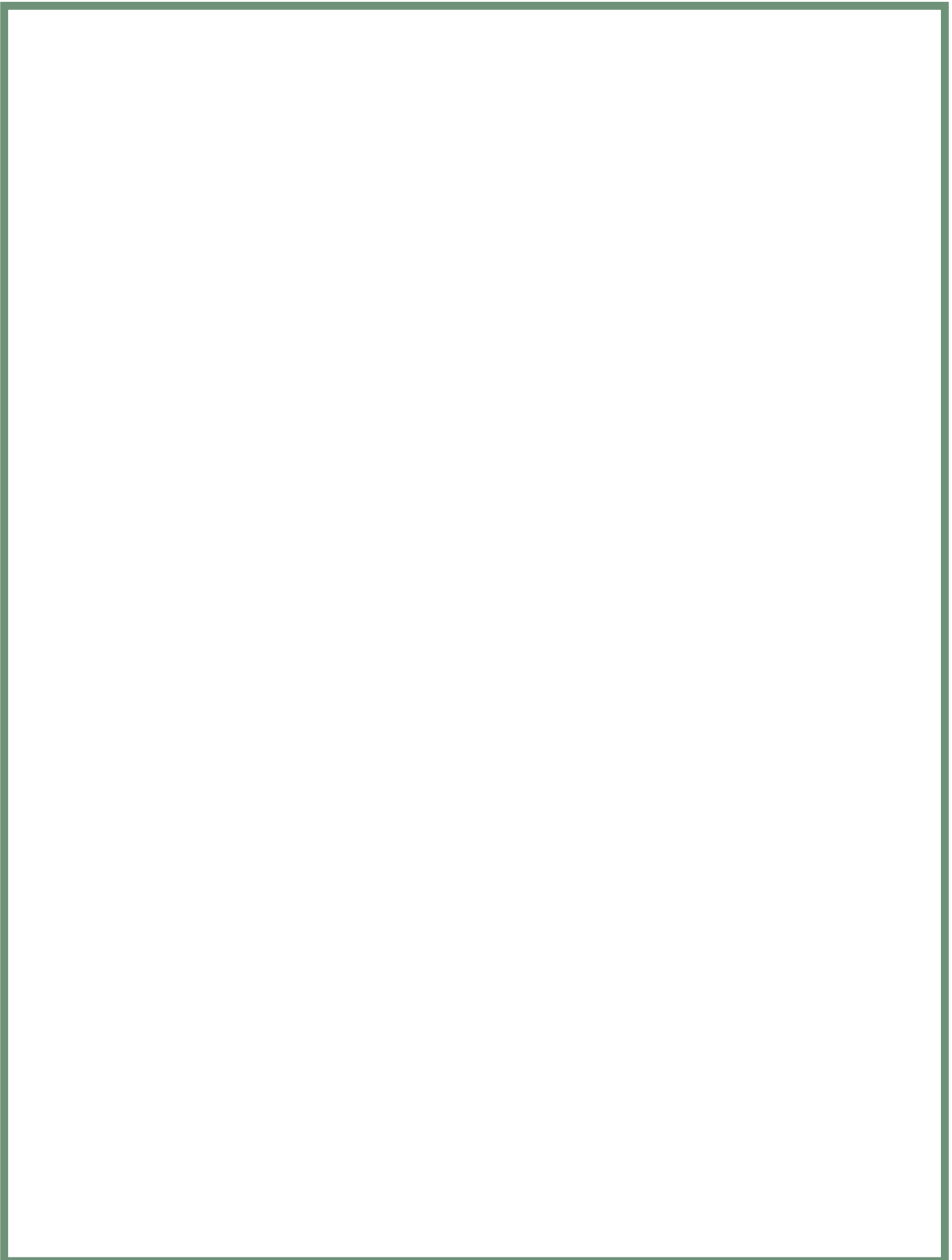
Question 1

Provide a brief programmatic overview of the current fiscal year's budget modifications and overall strategic goals.

Question 2

Provide a brief description of any budget modifications that will specifically advance equitable outcomes for residents or have a direct impact on socially vulnerable populations.

Include how your department plans to administer the program or budget item, what are the staffing and resource needs, and if applicable, how programs with a Metro-wide impact will ensure inclusivity and accessibility.

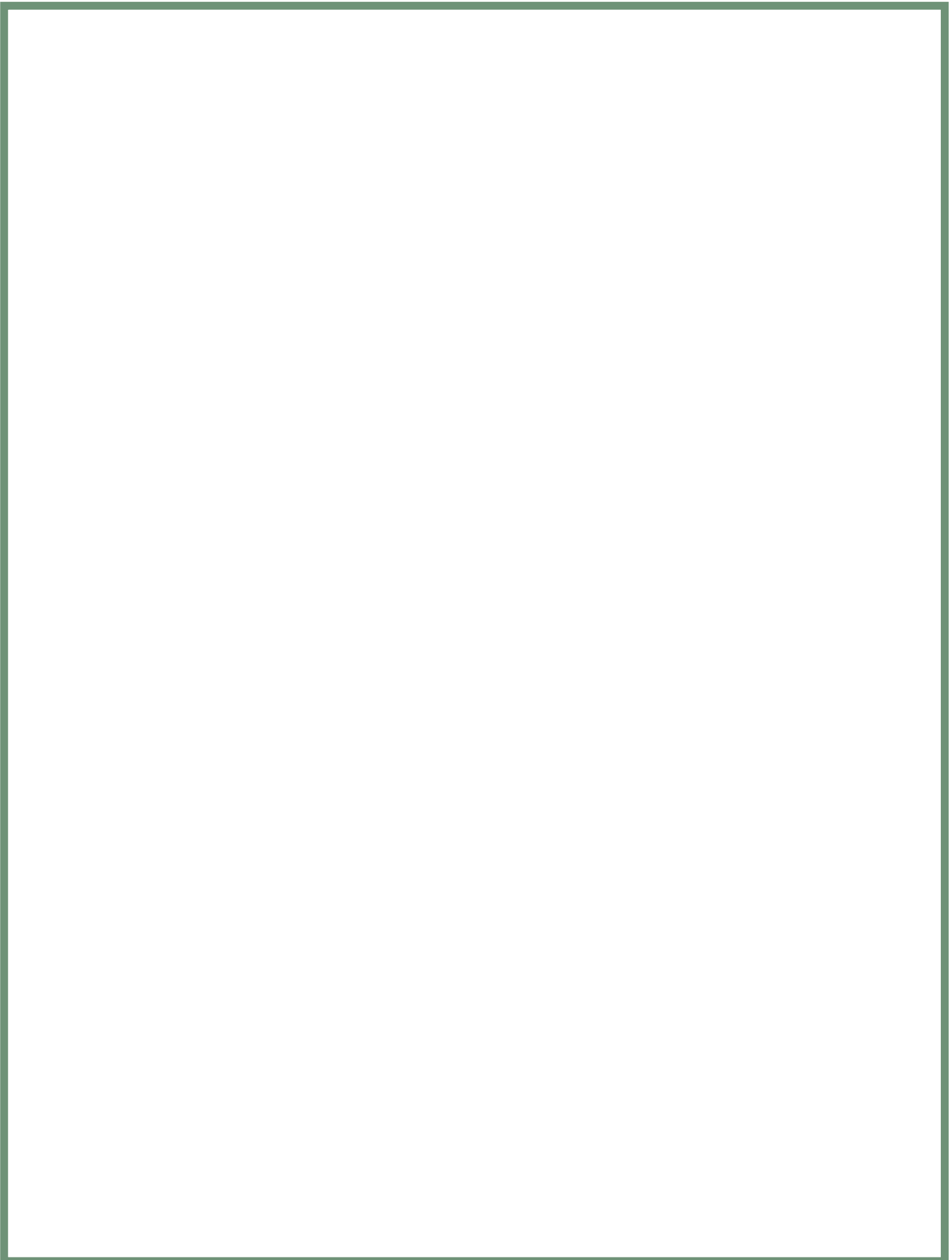


Question 3

Provide a brief description of any budget modifications that are intended to promote diversity, equity, and inclusion among department staff.

Question 4

Provide a brief description of any budget modifications that will enhance departmental community engagement efforts or access to government services.



Question 5

List any remaining budget modifications that do not have a direct or clear equity impact.

Next Steps

Start conversations about equity within your department and the execution of its mission.

Revisit the Budget Equity Tool to gauge progress being made.

Continuously look for ways to integrate equitable practices into your department.

Utilize the [Office of DEI](#) to assist your department in achieving its equity goals.

Office of Diversity, Equity, and Inclusion

The Office of DEI is here to answer any additional questions about the Budget Equity Tool or general questions about diversity, equity, and inclusion. There are also training videos and further information on the tool available on the Office of DEI's [SharePoint site](#).

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