Resource Allocation Questions
(Budget, Human Resources, Grants, Purchasing, Contracting)

Identifying and eliminating the root causes that lead to inequities is the heart of our Lens work. Providing support, technical assistance, and a toolkit to engage institutions in deep, reflection conversation, planning, and action to promote transformational change is the goal of this initiative. We know that all organizations follow a set of guiding practices to allocate resources, create policy, and make decisions. We also know that existing processes are often inequitable. For this reason, we have included two additional Lens versions that build upon the nine questions in the *Lens At A Glance* to more specifically address critical root cause areas in organizational structure and practice: resource allocation, and policy and decision-making.

Before starting this *Resource Allocation* version, please review the *Lens At A Glance*, paying particular attention to the section about barriers to success (Question #7). Identifying barriers and constraints is exceptionally important when assessing decisions in the areas of resource allocation, as many of the decisions are dependent upon external factors such as federal mandates, grant requirements, and personnel rules and regulations.

The four areas we focus on for this version are budget, funding (new or existing), purchasing, and human resources.

- **Budget:** How are we prioritizing funding? What are our true priorities and how are they reflected in the numbers?
- **Funding (new or existing):** Regarding grant funding, how are we using the grant money for addressing equity and racial justice? What are the plans for ongoing sustainability? What limitations exist around funding?
- **Purchasing:** Includes any expenditures on supplies, services (contracting), and other supportive resources for programming.
- **Human resources*:** Includes hiring, demotions, firing, retention, talent development.

* The area of human resources requires more in-depth analysis and application. This version includes just a few questions to provide an overview of the intersection between human resources and equity/racial justice. For more information, see the Employment Systems, Complaints Processes, and Management sections of Appendix 3, the Organizational Racial Equity Checklist.

Balajee, Sonali S., et al., (2012). *Equity and Empowerment Lens (Racial Justice Focus)*. Portland, OR: Multnomah County.

Questions

1. Consider all suppliers of goods and services that the organization purchases.
   - Does your budget process have supplier diversity goals? (e.g. racial and ethnic, gender, small/large business suppliers.)
   - What goals promote diversity outside of the organization in addition to internally?
   - How does the proposed action support Minority, Women, and Emerging Small Businesses (MWESB)?
     - By building capacity for MWESB contractors? Examples include: technical assistance, educative online materials, etc.
     - by tracking who the contractors currently are (especially in areas that don't require bids, and do not already have MWESB in their language)?

2. How does your budget prioritize programs and strategies that build community capacity, specifically in communities most affected by inequities?

3. Often programs and practices funded by a single source of funding are more easily eliminated during budget cuts. How are you developing multiple funding streams for programs that address equity and racial justice?

4. As part of the budget process, do documents and presentations clearly state a commitment to equity and racial justice, including any guiding principles and values?

5. In the creation of your budget, how are you engaging various levels of staff (paying particular attention to communities of color, immigrants, and refugees) in frequent, proactive, ways to identify yearly budget priorities?

6. How have you or how can you innovatively engage communities of color, immigrants, and refugees who are not staff in your budget process?

7. For specific budget proposals (Keleher, 2009):
   - Will the budget proposal reduce, limit, or eliminate programs that are vital to or disproportionately needed by, particular disadvantaged racial/ethnic communities?
   - Will the proposal increase, expand, or create programs that are vital to or disproportionately needed by particular disadvantaged racial/ ethnic communities?
   - Will there be adequate provisions to ensure success and fairness, including sufficient public participation by stakeholders in development, implementation, and evaluation?
   - What modifications in the proposal are needed to maximize racial justice and inclusion?

8. Regarding human resources (Lopes & Thomas, 2006):
   - What are your hiring practices? How do they incorporate multiple strategies?
   - How do job announcements/postings state the organization's desire for candidates from equity-seeking groups (paying particular attention to communities of color, immigrants, and refugees)?
   - How do job qualifications acknowledge the value of experiences in working with communities of color, immigrants, and refugees, knowledge of anti-racism/anti-oppression frameworks, the ability to work within racially diverse teams, and the capacity to work in languages other than English?

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