Advancing Equity through Resource Allocation

Budgets and resource allocation tools are moral documents that either uphold or dismantle systems of exclusion. Below are steps to advance equity through the resource allocation process.

What are some types of resources that should be considered?

1. Fiscal budget
2. Staffing and staffing support (including student employees, teaching assistants, graduate assistants, etc.)
3. Program funds
4. Professional development funds
5. Restricted and unrestricted funds
6. Allocation of staff time to advance equity and inclusion efforts

Steps to consider:

1. **Apply an equity lens** - Use an equity framework in resource development and allocation. Clearly understand and articulate implicit and explicit biases that go into resource decisions. Consider the impact of resource decisions on individual, institutional, and structural factors.
   a. How does each line item align with the goal of advancing equity?
   b. How do budgetary and resource decisions perpetuate inequity? Benefit or burden URMs?
   c. What are the recurring funding gaps or limitations in your overall budget that could inhibit your department/organization’s ability to advance equity and inclusion?
   d. How would proposed reductions impact URMs, and what strategies could the department/organization employ to mitigate any potential adverse impacts?
   e. What inequities experienced by URM students, faculty, and staff could be addressed by specific allocations or realignments in the budget and other resources?
   f. How will your resource decisions build your capacity to engage with, and include URMs in your activities? (e.g. improved leadership opportunities, advisory committees, boards and commissions, meetings, etc.)
   g. How will your department/organization allocate funding to ensure documents, policies, plans, and meetings are readily accessible to your constituents?
   h. How can you dedicate funding to staff positions responsible for embedding equity throughout the entire organization and transforming organizational practice?
2. **Be data driven in resource decisions**
   a. What data is driving your budget and resource decisions?
   b. How will you measure progress or "value added" based upon resource decisions?
   c. How can you use disaggregated data (e.g. racial, ethnic, gender, economic, etc.) to prioritize and develop criteria for resource distribution?
   d. What additional disaggregated data will your department/organization collect, track, and evaluate to assess impact moving forward and inform future resource decisions?

3. **Incorporate transparency into the process**
   a. Who contributes to the budget and resource allocation process?
   b. How will URMs be consulted to identify resource opportunities and needs?
   c. Be transparent about funding allocations and use of resources; consider the budget to be a moral contract with your team
   d. Operate with accountability - develop baseline measures, set goals, and measure progress over time.

**At an institutional level:**

1. Track and realign resource allocation to ensure that departments direct resources to engage and impact those with greatest need (e.g. students, faculty, and staff) in order to advance health equity
2. Track and realign resource allocation to ensure that departments direct resources to target upstream policy, systems, and environmental interventions that address equity
3. Apply participatory budget tools and/or processes to enable community decision-making on where funding should be allocated
4. Leverage and integrate funding streams (e.g., general funds, categorical funding, and grant funding) to advance equity, including partnerships with communities and upstream policy, systems, and environmental change
5. Align payment methods, quality improvement, and fiscal incentives with performance on equity measures
6. Collaborate with foundations, private donors, and others to direct resources toward partnerships that address diversity, equity, and inclusion
7. Create and/or support a fund for staff and/or community innovation to address equity and inclusion
8. Fund initial equity and inclusion capacity building with a clear plan of how to institutionalize processes, plans, and activities into the long-term department budget

**Resources**


*City of San Antonio Fiscal Year 2021 Budget Equity Tool.* (n.d.). City of San Antonio Office of Equity.

https://www.sanantonio.gov/Portals/0/Files/Equity/BudgetEquityTool.pdf