



MONTGOMERY COUNTY DEPARTMENT OF PARKS
THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

MCPB Agenda Item 3
April 4, 2019

MEMORANDUM

Date: March 28, 2019

TO: Montgomery County Planning Board

VIA: Michael F. Riley, Director of Parks
Mitra Pedoeem, Deputy Director, Administration *Mitra Pedoeem*
John Nissel, Deputy Director, Operations *JN*
Andrew Frank, Acting Chief, Park Development Division *RAF*
Patricia McManus, Acting Chief (CIP), Park Development Division *PM*

FROM: Carl Morgan, CIP Manager, Park Development Division *Carl Morgan*

SUBJECT: Strategy for Preparing the FY21-26 Parks Capital Improvements Program

Staff Recommendation

Obtain guidance and feedback from the Planning Board on evaluation criteria, goals and priorities for the Parks FY21-26 Capital Improvements Program (CIP).

Background

Every two years the County Council approves a six-year capital improvements program (CIP) for each department in County government and for each public agency, including the M-NCPPC. This report will look at the components of the current CIP, the CIP process, and guiding principles that shape the CIP. Staff will use feedback from this strategy session to guide us as we evaluate project submissions and prepare recommendations for the FY21-26 CIP.

Some CIP Basics

State law requires that the Montgomery County Council approve the CIP for the Montgomery County side of the Maryland-National Capital Park and Planning Commission.¹ It also requires that the Commission submit a new CIP to the County Government every odd-numbered year by November 1, which is about six months before the County Council adopts the County-wide CIP in May. In the year prior to the submission, the Department works with staff, the Planning Board and the public to gather project ideas, prioritize them, and program them into a working CIP. Once adopted, the CIP serves as the plan or roadmap for how the Commission will fund park development and park acquisitions in the next the six years.

¹ Md. LAND USE Code Ann. § 18-112

Here are some key facts about the CIP:

- While it is created biennially (every two years), it is reviewed annually
- It sets the capital budget for each upcoming fiscal year
- The capital budget is the aggregate of all appropriation requests for a fiscal year
- The capital budget must be consistent with the CIP at all times; if it is amended, the CIP is typically amended as well
- Projects in the CIP are described on Project Description Forms (PDFs), of which there are two main types:
 - Stand-alone projects – there is a beginning and end to the project (e.g. construction of a new park or a major park renovation)
 - Level-of-effort (LOE) projects– a project that continues indefinitely and supports various sub-projects that become a capital program such as the programs for trails, ballfield improvements, or stream protection.
- Projects or sub-projects in a level-of-effort project must be \$30,000 or more with a life expectancy of at least 15 years²

The Current CIP, FY19-24

A summary of our Current CIP is attached on **page ©1**.

A Roadmap for the Next CIP, FY21-26

The CIP process is complex and lengthy, requiring the Department to begin about a year-and-a-half prior to the CIP going into effect. Some of the major milestones include:

- Gathering project requests (winter 2018/2019)
- Strategy and prioritization (spring 2019)
- Scenario building (spring/early summer 2019)
- Work sessions, adoption and preparation of the submission (late summer/fall 2019)
- County review (winter 2019/spring 2020)

We discuss the milestones in more detail in this report on **page ©7**, however, the primary purpose of this session with the Board is to obtain feedback and guidance regarding the CIP strategy and the project prioritization process (the second bullet), including a new approach to address equity. Understanding the Board's strategy and priorities now will help the Department as we work through the CIP process and present CIP recommendations throughout the CIP season (this spring, summer, and fall).

Sessions and public meetings with the Planning Board will include:

- Strategy Sessions
 - April and July 2019
 - New approaches to Equity
 - Review and affirm the Planning Board's overall CIP Strategy

² If the project is under \$30,000 it is funded by the operating budget. Projects over \$5,000 but less than \$30,000 are considered Major Maintenance.

- Public Forum
 - May 2019
 - An opportunity to receive direct feedback from the public
- Work Sessions
 - September 2019
 - Two sessions
 - Review of funding scenarios for for CIP projects
- Adoption Session
 - October 2019
 - Adopting a final scenario to prepare to transmit to Montgomery County Government

Strategy for the Currently Adopted FY19-24 CIP

One of the fundamental components of the Department's work in preparing the CIP is understanding the Planning Board's priorities and strategy. With a park system of this size and age, there are always more candidate projects than limited funding and resources will allow. This requires us to have an increasingly sophisticated process for prioritizing and allocating funds so that we can get the right parks in the right places for all residents in Montgomery County.

In 2005, the Board approved three primary criteria for staff to follow in developing the FY7-12 CIP. These criteria (immediacy, need, and efficiency) have been incorporated in subsequent CIPs, including the overall strategy for the current FY19-24 CIP. The criteria provide general guidance in evaluating the priority of projects within the CIP and are outlined below:

Planning Board Evaluation Criteria:

- 1. Immediacy:**
 - The project repairs or replaces facilities necessary to protect public health, safety, and welfare.
 - The project preserves natural, cultural or historic resources that might otherwise be lost or degraded if prompt action is not taken.
 - The project upgrades facilities to comply with current code requirements and laws.
 - The timing of the project is dependent on coordination with related projects of other County agencies or interest groups.
 - The project is included in the first phase of a master plan.
- 2. Need:**
 - The project is already programmed in the CIP and is therefore already promised to a community.
 - The project provides facilities to an under-served geographic area.
 - The project provides facilities to an under-served population group.
 - The geographic distribution of proposed projects is equitable.
 - The project provides facilities to serve unmet needs countywide.
 - The project serves a need identified by the surrounding community.
- 3. Efficiency:**
 - The project increases revenue, results in cost savings, and/or improves operational efficiency.
 - The project leverages an opportunity, such as a partnership, contribution, donation or grant.

- The project has a high cost/benefit ratio by serving a large number of people for a reasonable cost.
- The project prevents further degradation of existing facilities which could be costly to repair later.

In 2015, the Board also added the following focus areas as part of an overall CIP Strategy for FY19-24 (also attached on **pages ©13-14**).

4. Public Access to Natural Areas

- Serves park users and protects natural resources
- Improves and expands trail networks
- Provides natural resource-based recreation opportunities

5. Trails

- Increasing trail construction and renovation efforts, both natural and hard surface

6. Ballfields

- Making ballfields available and convenient to a growing park constituency

7. Urban Parks

- Increasing focus on activations and improvements
- Focusing more on urban areas where infrastructure is often older and open space is limited
- Addressing changing needs and interests of urban populations

8. Acquisitions

- Targeting urban parks and high-density areas
- Seeking potential for natural resource-based recreation as well as enhancing the natural environment

9. Project Delivery

- Fewer large-scale renovations
- More targeted, phased renovations of park components by utilizing level-of-effort projects
- Using in-house staff resources where possible
- Taking advantage of interdepartmental partnerships
- Focusing on level-of-effort projects to maintain what we have and implement improvements to parks quickly

10. Facility Planning

- Activating urban parks
- Focusing on smaller projects and studies

Even though criterion 2 (Need) refers to equity, in 2017, the Board placed an increased emphasis on equity by separating it out and included the following:

11. Equity

- The project provides services or facilities to higher populations of lower income residents with low levels of access to parks

- Tools that may be used to determine Equity include Park Equity scores as per PROS 2017 and the methodologies in the Energized Public Spaces Functional Master Plan for Parks in Mixed Use & Higher Density Residential Areas (EPS FMP)

Before requesting feedback from the Board regarding what to continue or discontinue of this strategy moving forward into the FY21-26 CIP, staff would like to address the issue of equity.

An Evolving Approach to Address Equity

Equity has been a prioritization factor and part of the CIP since for the FY 07-12 CIP adopted in 2005. However, determining what it means and how it is tracked and implemented has been an evolving discussion over time. With each CIP the Department has attempted to look at equity more closely.

Equity as a Factor of Density, Income, and Walkability

The 2017 Park, Recreation and Open Space (PROS) Plan looked at three factors to aid in addressing equity in the CIP: density, income, and walkable access to parks. It recommended adding this “park equity” to the CIP and using it as a prioritizing factor when recommending new parks and open space in master plans.

The 2017 PROS Plan was created using the Vision 2030 Strategic Plan for Parks and Recreation (adopted in 2011) as a foundation. Vision 2030 stressed the importance of equity by making a pledge to “engage a diverse community and proactively respond to changing demographics, needs and trends.”

The 2017 PROS Plan was not yet adopted while the Department was working on the FY19-24 CIP, but based on the draft of the plan, park equity was added to the CIP strategy in 2017 as a stand alone criterion. The park equity map developed for PROS became an additional tool for equity and was consulted as the Department prioritized new facility planning projects that would eventually become independent projects in the CIP.

Concept of Social Equity

The increased focus on equity in the PROS Plan was influenced by the National Recreation and Park Association (NRPA), which includes “Social Equity” as one of the three pillars of its core mission (the other two pillars are Conservation and Health and Wellness³). Social equity in the NRPA definition specifically looks at overcoming barriers to park accessibility caused by income level, ethnicity, gender, ability, or age. The NRPA stresses that focusing on social equity has many benefits, including:

- Public enjoyment and engagement. Where parks and open space are plentiful and recreation services strong, residents enjoy the closest attachment and engagement within their communities; and studies indicate higher levels of local gross domestic product and economic well-being;
- Quality recreation time with family and friends. Parks and recreation services provide a space and a reason to partake in enjoying quality time, relaxation, and fun among family

³ Online at: <https://www.nrpa.org/our-work/Three-Pillars/>

- members and friends, thus strengthening the social and familial bonds that provide balance and satisfaction in life;
- Improvement of mental and physical health. Parks and recreation can reduce the impacts of chronic diseases, especially in such vulnerable populations as children, seniors, and the underserved; and
- Measurable decreases in rates of crime and other detrimental activities.

Energized Public Spaces and Implementing Equity

The 2018 Energized Public Spaces (EPS) Functional Master Plan uses social equity as the primary criteria to determine which areas of the EPS Study Area should be targeted for implementation efforts. The plan sets up a methodology to

- Identify where parks and open space are needed most to serve dense populations within walking distance.
- Prioritize parks and open spaces for implementation using social equity and other factors.
- Propose innovative tools and new funding sources to activate and connect parks, renovate and repurpose existing facilities, develop new facilities, and create new parks and open spaces.

Zeroing in on Race as a Means to Achieve Equity

One form of equity that has been insufficiently addressed in government policy and decision-making is racial equity and how to advance it. In many ways, racial equity has been a component of overall equity and has long been recognized as important. But one can also argue that the centuries-long persistence of racial inequity would either indicate a lack of sufficient recognition, or at least a failure or shortfall of government policy and decision-making to correct it. Policies and discussions about racial equity have often been focused on equality-based solutions more than equity-based outcomes (see **page ©17** for a discussion of equity vs. equality). Until the outcome is achieved, the solutions need to be rethought.

The conversation about racial equity is one that can be difficult for some people to have because the long-time persistence of racial inequity also has a tendency to make it a very emotionally charged discussion. A typical response is to have conversations that are devoid of racial references, a “color-blind” approach that would avoid perceptions of racial bias or to avoid stirring up emotions. The challenge to this approach is that it skirts around the issue and very seldom advances racial equity in a meaningful way. If we are to address racial inequity, we should not be afraid to discuss race directly.

Montgomery County policymakers have recently been trying to address this by changing the conversation to a more direct approach. Rather than focusing on equity in a broader, generic sense, they have chosen to shift the conversation first to one of racial equity.

In April 2018, the County Council adopted Resolution 18-1095 to affirm the Council’s commitment to creating a Racial Equity and Social Justice Policy for Montgomery County. They also directed the research arm of the Council, the Office of Legislative Oversight (OLO), to study racial equity. In September 2018, OLO released a report entitled *Racial Equity in Government*

Decision-Making: Lessons from the Field (executive summary on **page ©20**). Since then, the Council has committed to keeping the conversation going in a year-long conversation about racial equity with the ultimate goal of enacting a Racial Equity and Social Justice Policy in Fall of 2019. The Council's Racial Equity and Social Justice Initiative Timeline is provided on **page ©25** of this report for reference.

Looking at the timeline of the Parks CIP, the County's equity timeline creates a challenge. It means that the Department and Board will have to develop a CIP that recognizes racial equity in a manner consistent with the County's policy before the policy is drafted and adopted. The Department and the Board will have to do their best using the tools we currently have at our disposal ahead of the formally adopted policy.

There are opportunities here, however. As the planning body for Montgomery County, the M-NCPPC is the agency with the best equipped toolbox to look at racial demographics. We will use these tools to inform the FY21-26 CIP. When it comes time to prepare the next CIP for FY23-28, we will have not only the toolbox, but the formal policy in place and two years of experience addressing racial equity and social justice with a new perspective.

Tools for Equity

The Department's work in the FY21-26 CIP will include a new racial equity lens to view CIP projects in the prioritization and justification process. This will be in addition to other aspects of equity that we already employ in decision-making.

This new work has already started. Parks Department planners and GIS analysts, working with staff in the Planning Department have created a GIS-based tool where we will be able to locate candidate CIP projects on three separate base maps. These are included on **page ©27** and include:

- Park Equity - PROS 2017
- Percent Area Median Income
- Racial and Ethnicity data

At this point in the CIP process, candidate project requests have been assigned to their respective capital projects in the CIP. Within each CIP project, the project description form (PDF) managers are making first round prioritizations and programming projects as per the equity tools and the other prioritization criteria of the current CIP strategy. Using the equity tools, PDF managers and other decision-makers above them are able to take projects that otherwise would be close in priority and assign a higher priority to projects that are in areas that are minority dominant, low income, and have a low park equity score as per PROS 2017.

This initial assignment will start the prioritization conversation that will continue into the meetings of the Evaluation Committee this spring, prior to the next CIP strategy session with the Planning Board.

Seeking Planning Board Input for Strategy and Equity

- ***Staff recommends the Board adopt the FY19-24 CIP Strategy as the FY21-26 Strategy with revised language for Equity***

Underlined text is added language

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Equity

- The project provides services or facilities to communities where there is a predominance or majority of racial or ethnic minorities
- The project provides services or facilities to higher populations of lower income residents with low levels of access to parks
- Tools that may be used to determine Equity in the use of tax-supported CIP funds include Park Equity scores as per PROS 2017, ~~and~~ the methodologies in the Energized Public Spaces Functional Master Plan for Parks in Mixed Use & Higher Density Residential Areas (EPS FMP), and M-NCPPC maps for Racial and Ethnic Predominance and Percent Area Median Income

Conclusion

The Department will continue to review and evaluate new and existing CIP requests. This review is being performed within the context of the issues outlined above and described in the attachments. We will return to the Board in July to continue discussions on CIP strategy. In addition to any other topics identified in today's discussion, Staff would propose discussing topics that include:

- The county's fiscal outlook
- What is in the current CIP that will roll over to FY21-26
- Level-of-effort and Stand-alone projects
- Potential new projects
- Funding sources in the CIP and their status, including funding from the State, the County and the Commission

Attachments

Strategy Session #1 Supporting Documents

- The Current FY19-24 CIP, Page ©1
- Milestones in the FY21-26 CIP, Page ©7
- CIP Strategy and Evaluation Criteria FY19-24, Page ©13
- Prioritization: EAM and Facility Planning, Page ©15
- Equity vs. Equality, Page ©17
- OLO Report: Racial Equity in Government Decision Making: Lessons from the Field, Page ©20
- Racial Equity and Social Justice Initiative Timeline, Page ©25
- Tools for Equity, Page ©27

Strategy Session #1 Supporting Documents

The Current FY19-24 CIP



Highlights of the approved FY19-24 CIP

- New Projects
 - Park Refreshers (\$19.6 million) - smaller scale renovations, done more frequently, in less time, at lower cost and in a more efficient manner than the more typical facility planning/stand-alone method. Projects are in the \$1m to \$3m range.
 - Vision Zero (\$1.9 million) – a traffic safety project that aims to achieve a highway system with no fatalities or serious injuries involving road traffic. This project will implement trail/road intersection improvements identified in the Department’s Trail Intersection Safety Improvement Study of 156 intersections, which was completed in Fall of 2017.
- Focus on maintaining the park system – increases from the prior CIP in
 - ADA Compliance (\$1.2 million)
 - Ballfields (\$702k, including funding for Community Use of Public Facilities fields at schools)
 - Life-Cycle Asset Replacements (\$7.4 million)
 - Play equipment
 - Tennis and Multi-Use Courts
 - Repaving of Parking Lots and Paths
 - And other minor renovations
 - Restoration of Historic Structures (\$515k)
 - Trail Renovations (\$900k)
 - Urban Park Elements (\$1 million)
 - Water Quality (\$5.24 million) - Water Quality related projects will be funded with water quality protection charge supported funding rather than GO bonds that compete with schools, roads, and other non-park improvements.
- Major capital projects in the works
 - Brookside Gardens Master Plan (\$1.7 million, includes a new conservatory and renovations to the rose garden, Design FY22, Construction FY23)
 - Hillandale Local Park renovation (\$5.7 million, design ongoing, construction FY20)
 - Little Bennett Regional Park Day Use Area (\$8.7 million, Design FY19, Construction FY21)
 - Ovid Hazen Wells Recreational Park (including carousel relocation, \$5.1 million, Design FY19, Construction FY21)
- Scaled down projects
 - Caroline Freeland Urban Park renovation (from \$3.8 million to Park Refresher under \$3 million)
 - Woodside Urban Park renovation (\$7 million to Park Refresher under \$3 million)
 - Hillandale Local Park renovation (\$7.5 million to \$5.7 million)
- Delayed Projects
 - Brookside Gardens Master Plan (\$1.7 million, includes a new conservatory and renovations to the rose garden, delayed from FY20 to FY22)
 - Little Bennett Trail Connector (\$2.8 million, construction funding delayed beyond FY24)

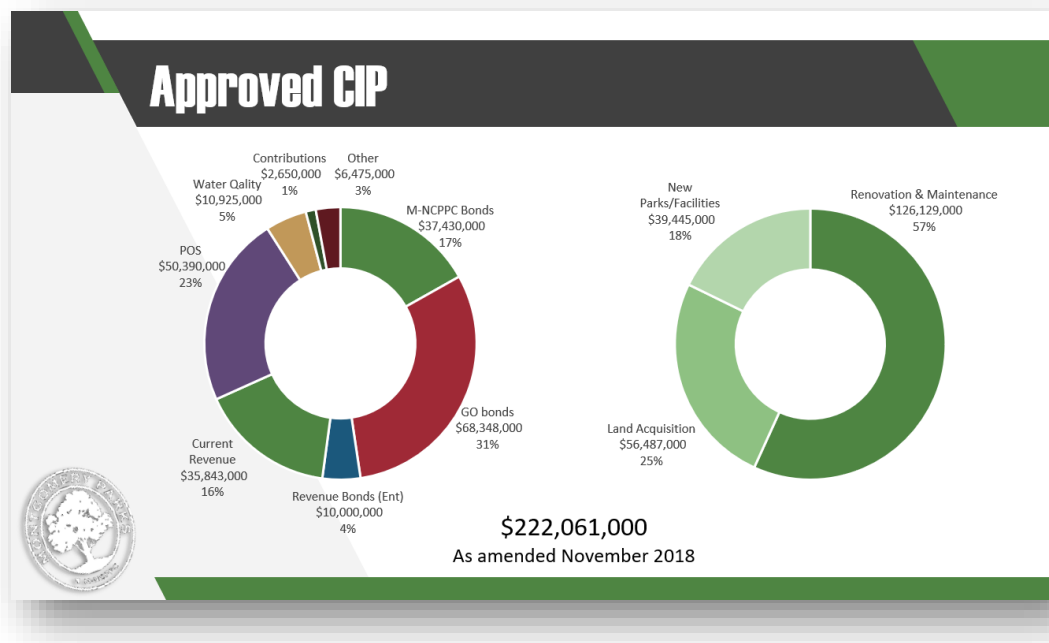
- Magruder Branch Trail Extension (\$2.6 million, delayed beyond FY24)
- Northwest Branch Recreational Park (\$4.6 million, delayed beyond FY24)
- Seneca Crossing Local Park (\$3 million, delayed beyond FY24)
- Wheaton Regional Park Improvements (included renovations to the Shorefield area, \$2.5 million, delayed beyond FY24)

Summary of the Approved FY19-24 CIP

The approved FY19-24 CIP is \$222.1 million, a 19% increase above the prior FY17-22 CIP at \$184.5 million. While the overall CIP increased 20% with respect to the former CIP, when looking at funding sources that are considered in the County Council's affordability calculations¹, this CIP is \$3 million more affordable than the prior FY17-22 CIP. The FY19-24 CIP also included new funding supported by Water Quality Protection Charge (\$10.9 million) and appropriation² for additional Program Open Space revenue that we anticipate from the State (\$28.4 million).

Funding Sources

Funding comes from various sources. Montgomery County Bonds (GO Bonds) and Current Revenue (cash) fund larger parks and system-wide improvements while M-NCPPC Bonds and Current Revenue fund local parks. Program Open Space is a significant funding source from the State of Maryland's



¹ Each year the County Council sets "Spending Affordability Guidelines" which are "An approach to budgeting that assigns expenditure ceilings for the forthcoming budget year, based on expected revenues and other factors. Under the County Charter (Section 305), the County Council is required to establish spending affordability guidelines for both the capital and operating budgets. Spending affordability limits are also set for WSSC by the Councils of Montgomery and Prince George's counties" (Budget Book: Glossary, Office of Management and Budget, Montgomery county Maryland, <https://reports.data.montgomerycountymd.gov/omb/glossary>).

² Appropriation is defined as "Authority to spend money within a specified dollar limit for an approved work program during the fiscal year. The County Council makes separate appropriations to each capital project and to Personnel Costs and Operating Expense for each County operating department" (Budget Book: Glossary, Office of Management and Budget, Montgomery county Maryland, <https://reports.data.montgomerycountymd.gov/omb/glossary>).

transfer tax. This CIP also features some revenue and long-term financing supported by the Water Quality Protection Charge to county residents and property owners. We also receive funds from a myriad of other sources that include grants, contributions, enterprise revenues, and federal aid.

Categories

The Parks' CIP projects generally fit in one of the following categories:

- Renovation and Maintenance – repair, renovation, and lifecycle replacement of existing park facilities and supporting infrastructure. This includes natural, cultural, and historical resources on parkland.
- New Parks and Park Facilities – responding to unmet park and recreation needs.
- Land Acquisition – continued commitment to preservation of parkland through Legacy Open Space and park acquisition programs.

Category	Amount	Percentage of Six-Year CIP
Renovation and Maintenance	\$126,129,000	57%
Land Acquisition	\$56,487,000	25%
New Parks and Park Facilities	\$39,445,000	18%

The highest percentage of the CIP “pie” is dedicated to maintenance and renovation. The primary focus of the CIP is to optimize what we have currently in the park system. The Department continues to invest more on maintenance and renovation projects as they tend to alleviate our operating budget of substantial maintenance costs. While new parks and park facilities are necessary to keep up with a growing population and increased demand on the parks, these parks and facilities create operating budget impacts (OBI). Because of the tight fiscal climate, the Department has focused on ways to keep OBI as low as possible. However, we cannot entirely forego funding for new parks as the 2017 Parks, Recreation and Open Space (PROS) Plan and other planning guidance continue to identify park needs across the County that should be addressed. This means that the Department must be conscious about designing and developing new facilities by finding innovative methods to reduce OBI, without compromising their historical/cultural integrity or environmental best management practices and mandates.

Maintenance and renovation is deemed a high priority by both the Board and Council. Although we have made progress in addressing infrastructure replacement needs in our system, there is still much work to be done to catch up with needed renovations in the parks.

Theoretically, funding for maintenance and renovation should increase from one CIP cycle to the next as existing infrastructure continues to deteriorate and more parks and amenities are added to our park system. It becomes increasingly difficult to maintain our existing parks when new facilities continue to be built. Additionally, as the Department and the County government are so close to the top of their spending affordability guidelines, it is difficult to propose new parks and large-scale renovations of existing parks which adds to the demands for

renovation and maintenance funding. Therefore, staff recommends continuing to give higher priority to renovation projects when evaluating new projects for the FY21-26 CIP as well as to increase some maintenance and renovation funding sources to meet the increasing demand and to keep up with increasing costs associated with construction prices, regulations and permitting. Surveys used in preparing the 2017 PROS Plan support this approach to optimize what we have.

FY19-24 CIP Program by Expenditure Category								
Approved November 2018								
PDF #	Project (PDF)	Six Year Total	FY19	FY20	FY21	FY22	FY23	FY24
LAND ACQUISITION								
<i>Continued commitment to preservation of parkland through Legacy Open Space and park acquisition programs</i>								
767828	Acquisition: Local Parks	17,717	2,997	2,330	3,395	2,750	4,300	1,945
998798	Acquisition: Non-Local Parks	13,270	2,135	2,135	2,250	2,250	2,250	2,250
727007	ALARF: M-NCPPC	6,000	1,000	1,000	1,000	1,000	1,000	1,000
018710	Legacy Open Space	19,500	3,250	3,250	3,250	3,250	3,250	3,250
	Category Total	56,487	9,382	8,715	9,895	9,250	10,800	8,445
NEW PARKS & PARK FACILITIES								
<i>Responding to unmet park and recreation needs</i>								
998773	Enterprise Facilities' Improvements	13,000	0	7,000	6,000	0	0	0
	Little Bennett Trail Connector	150	0	0	150	0	0	0
138703	Little Bennett Regional Park Day Use Area	8,740	256	317	600	1,715	2,786	3,066
098706	Magruder Branch Trail Extension	0	0	0	0	0	0	0
998799	Minor New Construction - Local Parks	1,850	275	275	300	300	350	350
998763	Minor New Construction - Non-Local Parks	2,130	405	225	350	350	400	400
871541	North Branch Trail	2,390	1,177	1,213	0	0	0	0
118704	Northwest Branch Recreational Park-Athletic Area	0	0	0	0	0	0	0
	Ovid Hazen Wells RP	5,100	295	181	1,039	2,375	1,210	0
138704	Seneca Crossing Local Park	0	0	0	0	0	0	0
058755	Small Grant/Donor-Assisted Capital Improvements (50%)*	1,350	625	125	150	150	150	150
	South Germantown RP Cricket Field	1,425	925	500	0	0	0	0
768673	Trails: Hard Surface Design & Construction	1,800	300	300	300	300	300	300
871540	Urban Park Elements (50%)*	1,250	125	125	250	250	250	250
	Category Total	39,185	4,383	10,261	9,139	5,440	5,446	4,516
MAINTENANCE & RENOVATION								
<i>Repair, renovation, and lifecycle replacement of existing park facilities and supporting infrastructure</i>								
128701	ADA Compliance: Local Parks	4,850	800	850	900	800	750	750
128702	ADA Compliance: Non-Local Parks	6,100	1,100	1,000	1,000	1,000	1,000	1,000
008720	Ballfield Initiatives	7,600	1,650	950	1,250	1,250	1,250	1,250
118701	Battery Lane Urban Park	0	0	0	0	0	0	0
078702	Brookside Gardens Master Plan Implementation	1,700	0	0	0	250	950	500
977748	Cost Sharing: Local Parks	450	75	75	75	75	75	75
761682	Cost Sharing: Non-Local Parks	300	50	50	50	50	50	50
87901	Caroline Freeland Urban Park	0	0	0	0	0	0	0
998773	Enterprise Facilities' Improvements	5,525	4,125	1,000	0	400	0	0
957775	Facility Planning: Local Parks	1,800	300	300	300	300	300	300
958776	Facility Planning: Non-Local Parks	1,800	300	300	300	300	300	300
	Hillandale Local Park	5,215	715	1,500	2,500	500	0	0
967754	PLAR - LP	19,383	3,745	3,120	3,250	3,279	3,019	2,970
871902	Park Refreshers	19,585	4,645	3,660	1,240	2,900	3,800	3,340
968755	PLAR - NL	20,982	2,964	2,964	3,709	3,709	3,818	3,818
058755	Small Grant/Donor-Assisted Capital Improvements (50%)*	1,350	625	125	150	150	150	150
888754	Trails: Hard Surface Renovation	2,700	450	450	450	450	450	450
858710	Trails: Natural Surface & Resource-based Recreation	2,100	350	350	350	350	350	350
871540	Urban Park Elements (50%)*	1,250	125	125	250	250	250	250
87904	Wheaton Regional Park Improvements	0	0	0	0	0	0	0
138705	Woodside Urban Park	0	0	0	0	0	0	0
871905	Vision Zero	1,900	200	200	300	300	400	500
871552	Josiah Henson Special Park	5,912	3,550	1,500	862	0	0	0
808494	Restoration Of Historic Structures	2,700	350	350	500	500	500	500
118703	Warner Circle Special Park	0	0	0	0	0	0	0
998710	Energy Conservation - Local Parks	222	37	37	37	37	37	37
998711	Energy Conservation - Non-Local Parks	240	40	40	40	40	40	40
078701	Pollution Prevention and Repairs to Ponds & Lakes	5,625	525	700	1,000	1,000	1,200	1,200
818571	Stream Protection: SVP	7,100	750	1,400	1,700	1,350	950	950
	Category Total	126,389	27,471	21,046	20,213	19,240	19,639	18,780
	GRAND TOTAL	222,061	41,236	40,022	39,247	33,930	35,885	31,741

* Project Expenditures are split 50/50 between the Infrastructure Maintenance and New Park Facilities categories

The chart to the left is a summary, grouped by expenditure category, of the current Adopted FY19-24 CIP.

Below you will also find a summary of past CIP requests, recommendations and final approvals by CIP cycle.

	FY07-12	FY09-14	FY11-16	FY 13-18	FY15-20	FY17-22	FY19-24	Biennial FY19-24
Planning Board Proposed	179.5	208.0	203.5	178.8	194.7	194.4	243.5	239.1 ³
CE Recommended	169.1	192.9	161.5	166.0	168.6	166.0	217.0	231.1
Council Adopted	170.7	196.4	166.1	178.8	178.2	184.2	222.1 ⁴	TBD

Amounts in Millions

After several years of very tight budgets dating back to the FY11-16 CIP, staff has been hopeful that the distance from the most recent recession would mean a more favorable environment for the upcoming CIP cycle. However, due to high levels of debt and other factors that have pushed funding levels close to the maximum that the County Council deems affordable, staff anticipates that there will again be limits to the number of new projects and capital program increases necessary to meet the needs of the park system. This will demand creativity on the part of the Department and the Board in meeting the growing needs of the park system.

³ The increase here included \$800k for Contributions appropriation to receive small grants, \$500k of County (CUPF) funds to renovate ballfields at schools, and \$16 million in Contributions appropriation to receive developer park impact payments as per the recently adopted Bethesda Downtown Plan.

⁴ This was originally \$219.9 million, but in November 2018, the Council approved five special appropriations raising the CIP to \$222.1 million.

Milestones in the FY21-26 CIP



The CIP Process is a complex process that involves various players and groups. However, all activities fall into at least five major milestones or phases:

- Gathering Project Requests (winter 2018/2019)
- Strategy and Prioritization (spring 2019)
- Scenario Building (spring/early summer 2019)
- Work Sessions, Adoption and Preparation of the Submission (late summer/fall 2019)
- County Review (winter 2019/spring 2020)

Gathering Project Requests (winter 2018/2019)

Project ideas come from various sources. They include public planning efforts, Department staff, citizens, public officials, and other opportunities. Department staff gather project ideas year-round from these sources and enter them into a project database in the Commission's Enterprise Asset Management (EAM) System where they are annually reviewed and prioritized for inclusion in the CIP. More information about the review and prioritization process is included in the Strategy and Prioritization section of the report.

Public Planning Efforts - Vision 2030, PROS, Master Plans and Other Studies:

There are a number of planning and strategic initiatives that regularly come out of the Commission's Planning Department, as well as from planners within the Parks Department. These forward-looking documents take inventory of existing conditions and resources; consider future trends, growth and needs; and make recommendations to guide growth. Some are county-wide, while others are focused on specific areas, locations or certain functional topics. Here are various strategic and master plans that will provide guidance to the CIP:

- **Vision 2030** – This Strategic Plan for Parks and Recreation adopted in 2011 provides guidance on general areas of greatest overall facility needs based on Level of Services (LOS) areas, as well as guidance on what facilities should be increased, decreased, or repurposed (some countywide, some linked to the four LOS areas).
- **2017 Park, Recreation and Open Space (PROS) Plan** – Parks, recreation, and open spaces are essential to the high quality of life for Montgomery County residents. The greatest challenge for the park and recreation system in Montgomery County is to equitably provide enough of the "right" parks and recreation in the "right" places for a growing population of residents and employees. Founded on principles in the Vision 2030 Strategic Plan for Parks and Recreation, The 2017 PROS Plan gives guidance on equitably activated, central community spaces, while meeting recreational

needs and protecting and managing natural and cultural resources for future generations. The plan also serves as the County's Land Planning, Preservation and Recreation Plan (LPPRP). Created every 5 years, the LPPRP also qualifies the County to receive Program Open Space funding, a significant source of CIP funding from the State specifically for acquiring open space and developing parks. The Plan's recommendations effectively:

- Create service delivery strategies to have the right park in the right place
- Renovate and repurpose existing parkland and facilities
- Implement new guidelines for urban parks
- Apply new plans to manage natural areas throughout the park system
- Manage and interpret historic and archaeological resources per cultural resources asset inventory database
- Create an implementation plan to distribute needed facilities equitably

In addition, the 2017 PROS Plan recommends prioritizing our investments according to three clear overarching themes:

- 1) Optimize existing parks and facilities
- 2) Create great, activated parks to equitably serve the County
- 3) Steward and interpret our natural and cultural resources

To the degree practicable, Staff have been using all the above criteria to develop our project priorities.

- **Area Master Plans** – Guidance on parkland acquisition, the role and type of each park or trail within a recommended open space system, suggested facilities for each park, and, sometimes, mechanisms for implementation
- **Site Selection Studies** – Guidance on location of specific facilities (in priority order), i.e., dog parks, skate parks
- **Park Master Plans** – Guidance on what facilities should be included in a specific park
- **Energized Public Spaces Functional Master Plan** – This Plan was approved and adopted in March 2018 and is a countywide functional master plan that defines a program to create more parks and public spaces to serve areas of the County most in need. The plan provides a comprehensive approach to how and where we create parks and public spaces in the parts of the county where more people live and work. It also introduces a new methodology to identify and prioritize public space and park needs in relationship to population and the existing supply of park amenities. A key element of the methodology evaluates walkable access to all public spaces to measure the relative supply of parks and public spaces. Park design, maintenance, and safety are taken into consideration, as well as measures of social equity. The Plan will help Montgomery Parks better identify needs, anticipate trends, and promote important goals such as health and social equity. This Plan also provides tools to make recommendations on parks and public spaces for areas not

undergoing a master plan process. In the long-term, an interactive inventory of accessible public spaces and mapping of the areas with the highest needs will result in better prioritization of scarce park resources.

Projects Originating from the Department

Department staff, particularly those in the field, take regular inventory of the conditions of the existing park infrastructure and natural resources. Based on their observations, assessments, analyses, and feedback from users and officials, they recommend capital projects to renovate and maintain the park system as well as capital projects that meet new demand and growth in the parks.

Citizen Ideas

The park system is the largest single amenity for residents of Montgomery County. As such, the Department is always looking for new ways to engage residents and listen to their feedback and ideas for improvements to the park system. This feedback comes from a variety of sources:

- Campaigns – concerted efforts to reach out to the public and solicit their feedback through presentations, events and activities, such as the Parks and Recreation of the Future campaign that the Department led in 2017 to engage the county for three initiatives, PROS, the Energized Public Spaces Functional Master Plan and the CIP. The Department sought to engage members of the community who traditionally have not participated in park development initiatives.
- Social Media – providing content to engage and inform county residents and to give residents a venue for responding on topics that are important or of value to county residents.
- Public hearings and forums – most planning and development efforts incorporate outreach to local residents affected to get their reaction, input and ideas on the effort.
 - Parks and Recreation Forum – The CIP process includes a Parks and Recreation Forum before the Planning Board and the Countywide Parks and Recreation Advisory Board where residents can address both bodies with written and/or spoken comments about things they would like to see in the county-wide park system.
 - Montgomery County CIP forums – During the CIP cycle, Montgomery County Government also holds a series of CIP forums hosted by each of its Citizen Advisory Boards (CAB) to obtain feedback from citizens on the county-wide CIP for all departments and agencies. Park Staff attends each forum to serve as a resource for answering questions about Parks projects and our agency's CIP. After the Forum Series, each CAB will submit a letter to the County Executive outlining their interests, issues and priorities in the CIP. These are usually held in late June or early July.
- Specific requests made to the department, letters, emails, calls, etc.

Input from Elected Officials

Residents of the County elect officials in all levels of government from the local level to state and federal government to represent their interests in government. From time to time, the Department hears from these officials about projects or initiatives where their constituents have interests or concerns or where the representative is leading an initiative or project in his or her respective district to improve the quality of life. Also, the Department coordinates annually with state representatives on opportunities to secure state funding for projects that allow limited County and Commission funding to be used on other projects. As a Department, we enter specific requests that come through elected officials into the mix of potential CIP projects where they can be reviewed and prioritized among other candidates. The recent project to renovate and soon to re-open the Maydale Nature Center is an example. Currently, Montgomery County legislators in the General Assembly are sponsoring 5 projects across 4 districts for a total of \$1.05 million that include:

- \$200,000 bill sponsored by Senator Craig Zucker and the District 14 delegation for renewing Columbia Local Park in Burtonsville;
- \$100,000 bill sponsored by Senator Craig Zucker and the District 14 delegation on the need for a playground replacement in Olney Family Neighborhood Park;
- \$250,000 bill sponsored by Senator Brian Feldman and the District 15 delegation in support of funding for the SEED (Sustainable Education Every Day) classroom in Black Hill Regional Park;
- \$250,000 bill sponsored by Delegate Marc Korman and the District 16 delegation for the Josiah Henson Museum and Education Center; and
- \$250,000 bill sponsored by Senator Nancy King and the District 39 delegation for a playground renovation in Centerway Local Park in Gaithersburg.

Other Opportunities

The Department often learns of additional opportunities that arise out of the interests of groups or individuals who propose and fund projects such as the recent plaza on the Capital Crescent Trail or the new Greenhouse in the Plant Propagation area at Brookside Gardens. Other times, the Department may receive funding for projects from developers that were identified in a master plan or site plan approval of the developer's project. The Department has also facilitated land acquisitions that were donated to the Commission.

Strategy and Prioritization (spring 2019)

Once candidate capital projects are entered into the EAM they go through a "sifting" process of multiple stages. When new projects come in, they are aggregated out to a candidate list respective to each of the current CIP projects, or in the case of newly proposed projects that would warrant a new, separate capital project, they are

added to the candidate list for facility planning. From there, the Department uses various tools, guidance and feedback to prioritize the projects. This includes:

- *Planning Board's CIP Strategy* – Refer to **page ©13**. How well the projects meet the Board's evaluation criteria and CIP strategy, including racial equity
- *Chair and Director Priorities*
- *Scoring criteria built into the EAM* – refer to **page ©15**
- *New Projects versus Renovation Projects* – currently, as per the Board and the Director's direction projects that focus on maintaining the existing park system are higher priority than new parks and new development.
- *Project justification score and Facility Planning Evaluation Matrices* – projects entered into the CIP and Major Maintenance request database, discussed earlier, are assigned a score which serve as an initial prioritization tool to compare new requests against each other and existing projects in the CIP (refer to **page ©15**). Projects that are candidates for facility planning are also prioritized against a scoring system (refer to **page ©16**). This is a starting point only as Department Staff consider the other criteria mentioned above as well as priorities assigned by Park Operations Staff and priorities assigned by the CIP Evaluation Committee
- *Priorities Recommended by Park Operations Staff* – Park Operations staff are most acutely aware of the needs in the park system since they are out in the field making observations first-hand. Their feedback is a valuable tool to assist the Department in fine tuning the prioritization of the projects mentioned above. They provide their feedback to the Division Chiefs who are part of the CIP Evaluation Committee.
- *Priorities Assigned by CIP Evaluation Committee* – This committee consists of the Department directors, region chiefs and division chiefs. Before convening, the chiefs are provided lists of the projects in their respective areas to review. The committee meets and reviews the CIP in its entirety. They look at how the current funding levels are meeting or not meeting the needs and priorities of the park system, identify any additional priorities, and make recommendations about funding to better meet the needs of the park system. One of the new features of the FY21-26 CIP cycle is that we have scheduled these meetings after the Planning Board's first strategy session so that the Committee will have some solid guidance on prioritizing factors to be considered as the Committee makes recommendations. The Evaluation Committee will meet in April through June prior to the Board's second CIP Strategy session in July.

Scenario Building (spring/early summer)

One of the biggest challenges in the CIP cycle is how to balance needs and the park system's future with affordability. While the "sifting" process mentioned earlier is ongoing, the Department's CIP staff will also engage staff from the Montgomery County Office of Management and Budget to understand what fiscal constraints the County Executive will request of various funding sources. The CIP staff will work closely with the Director's office to create scenarios that consider not only the Board's CIP strategy, but also what will fit within the constraints of the fiscal situation of the County.

Work Sessions, Adoption and Preparation of the Submission (fall)

In September 2019, once the final scenario or scenarios are complete, the Department will engage the Planning Board again in work sessions where we will present funding and timing recommendations for all CIP projects. We generally focus one session on local park projects that are primarily funded with the Commission's own bonds ("M-NCPPC Bonds") and Program Open Space funding, with the other session being devoted primarily to capital projects in non-local parks that are funded by the County's GO bonds and other funding.

At the beginning of October, staff follows up with the Board on any remaining issues and presents the final scenario to the Board for adoption. Once that action is taken, staff prepare the CIP for submission to the County as per their checklist and electronic submission requirements and formally transmit the submission on or before November 1, 2019 as required by State statute.

County Review (winter 2019/spring 2020)

The County Executive and County Council review the CIP according to the following schedule:

- County Executive review of the Parks CIP (November – December 2019)
- County Executive submits his recommended, County-wide CIP, including his recommendations for the M-NCPPC CIP, to the County Council (January 15, 2020, as per County Law)
- County Council holds public hearings for the FY21-26 CIP, typically three days (early February 2020)
- County Council Committee review of the Parks CIP, primarily by the Planning, Housing and Economic Development (PHED) Committee (February/March 2020)
- County Executive submits his recommended, County-wide Operating budget (often times with additional CIP amendments), including his recommendations for the M-NCPPC, to the County Council (March 15, 2020, as per County Law)
- County Council Committee review of the Parks Operating Budget (and any additional CIP amendments), primarily by the Planning, Housing and Economic Development (PHED) Committee (April 2020)
- Council approval of the CIP and the FY21 Capital Budget (May 2020)

CIP Strategy and Evaluation Criteria FY19-24



These criteria and areas of focus guide the evaluation and prioritization of projects for the Capital Improvements Program for FY19-24

Immediacy

- The project repairs or replaces facilities necessary to protect public health, safety, and welfare.
- The project preserves natural, cultural or historic resources that might otherwise be lost or degraded if prompt action is not taken.
- The project upgrades facilities to comply with current code requirements and laws.
- The timing of the project is dependent on coordination with related projects of other County agencies or interest groups.
- The project is included in the first phase of a master plan.

Need

- The project is already programmed in the CIP and is therefore already promised to a community.
- The project provides facilities to an under-served geographic area.
- The project provides facilities to an under-served population group.
- The geographic distribution of proposed projects is equitable.
- The project provides facilities to serve unmet needs countywide.
- The project serves a need identified by the surrounding community.

Efficiency

- The project increases revenue, results in cost savings, and/or improves operational efficiency.
- The project leverages an opportunity, such as a partnership, contribution, donation or grant.
- The project has a high cost/benefit ratio by serving a large number of people for a reasonable cost.
- The project prevents further degradation of existing facilities which could be costly to repair later.

Equity

- The project provides services or facilities to higher populations of lower income residents with low levels of access to parks
- Tools that may be used to determine Equity include Park Equity scores as per the 2017 PROS Plan and the methodologies in the Energized Public Spaces Functional Master Plan for Parks in Mixed Use & Higher Density Residential Areas (EPS FMP)

New vs. Renovation

- The predominant emphasis in the CIP should be on maintaining the current system and infrastructure

Public Access to Natural Areas

- Serves park users and protects natural resources
- Improves and expands trail networks
- Provides natural resource-based recreation opportunities

Trails

- Increasing trail construction and renovation efforts, both natural and hard surface

Ballfields

- Making ballfields available and convenient to a growing park constituency

Urban Parks

- Increasing focus on activations and improvements
- Focusing more on urban areas where infrastructure is often older and open space is limited.
- Addressing changing needs and interests of urban populations

Acquisitions

- Targeting urban parks and high-density areas
- Seeking potential for natural resource-based recreation as well as enhancing the natural environment

Project Delivery

- Fewer large-scale renovations
- More targeted, phased renovations of park components by utilizing level-of-effort projects
- Using in-house staff resources where possible
- Taking advantage of interdepartmental partnerships
- Focusing on Level-of-efforts on maintaining what we have and Implementing improvements to parks quickly

Facility Planning

- Activating urban parks
- Focusing on smaller projects and studies

Prioritization: EAM and Facility Planning



Prioritization: EAM

Projects entered into the CIP and Major Maintenance request database in the Enterprise Asset Management (EAM) system are assigned a score which serve as an initial prioritization tool to compare new requests against each other and existing projects in the CIP. The database utilizes an automated rating system that is based on several different evaluation criteria generally reflecting those approved by the Planning Board. Each criterion is weighted, points are added up, and a justification score is assigned to each project request making it easier to prioritize them within the CIP. This provides an initial prioritization that is then fine-tuned using the CIP Strategy approved by the Board. The criteria used by the database include:

Renovates Aging Infrastructure	<i>Reduces unexpected capital, operating or maintenance expenses of existing infrastructure</i>
Required by Mandates	<i>Federal/State/Local regulations (ADA, NPDES, other environmental regulations, etc.)</i>
Protects Natural or Cultural Resources	<i>Protects environmentally or culturally significant sites</i>
Supports Plans or Studies	<i>Supported by approved plans, including park/area master plans, surveys, condition or need assessment studies, LPPRP, etc.</i>
Meets Public Request	<i>Requested by public through testimony, C-tracks, letters, etc.</i>
Generates Revenue	<i>User fees, permits, admission fees, etc.</i>
Enhances Safety	<i>Eliminates hazard; repairs deteriorated condition thus reducing Commission's liabilities</i>
Operating Budget Impact	<i>Project requires increased staff, supplies/materials, capital outlay or utility costs.</i>

Prioritization: Facility Planning

Before projects can become a Stand-alone capital project or be included in the Park Refresher program, they must first go through facility planning that:

- ☐ **Completes 15-30% design for projects that will have significant capital investment through the “Park Refresher” or “Stand-alone” project requests**
- ☐ **Establishes:**
 - Program of Requirements
 - Preliminary Design
 - Determination of Regulatory Feasibility (Prelim. Permits)
 - Accurate Cost Estimate for Design and Construction
 - Includes Community Participation & Planning Board Approval
- ☐ **Completed for projects with significant capital investment and/or where design and construction costs cannot otherwise be accurately estimated**
- ☐ **Basis for requesting CIP funding from Planning Board & County Council to implement project**

Facility Planning Projects are prioritized as follows:

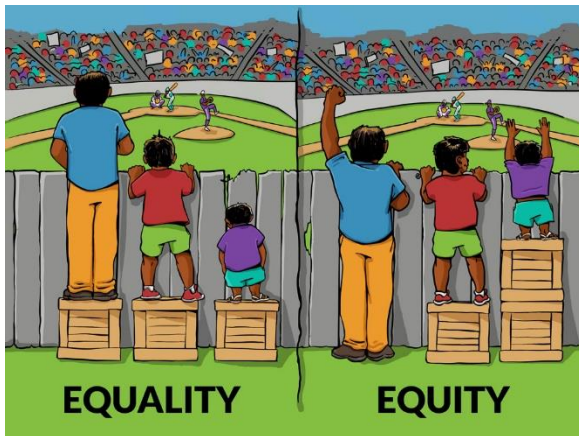
Master Plan Guidance for Park or Project	<ul style="list-style-type: none"> • <i>Area Master Plan</i> • <i>Park Master Plan</i> • <i>2017 PROS Plan</i> • <i>Vision 2030 Level of Service Area</i>
Park Equity Area (from PROS 2017)	<i>High concentration of lower income households with low walkable access to park entrances and trailheads (established by population density, median household income as a percent of area median income, and walking distance to parks and trailheads)</i>
Immediacy	<ul style="list-style-type: none"> ▪ <i>Protects public health safety and welfare</i> ▪ <i>Preserves natural, cultural or historic resources</i> ▪ <i>Upgrades facilities to comply with current codes</i> ▪ <i>Timing is dependent on related projects of outside groups</i>
Need	<ul style="list-style-type: none"> ▪ <i>Already programmed in CIP or promised to a community</i> ▪ <i>Provides facilities to under-served geographic area or group</i> ▪ <i>Provides facilities to serve unmet countywide needs</i> ▪ <i>Serves a need identified by the surrounding community</i>
Efficiency	<ul style="list-style-type: none"> ▪ <i>Increases revenue, results in cost savings or operational efficiency</i> ▪ <i>Leverages partnership, contribution, donation or grant</i> ▪ <i>High cost/benefit ratio, serves large numbers for reasonable cost</i> ▪ <i>Prevents damage from becoming worse, more costly to repair later</i>
Public Requests	<i>Community groups have requested project in one or more CIP cycles</i>

Equity vs. Equality



Article Summary: “The problem with that equity vs. equality graphic you’re using” by Paul Kuttner, for the full article, please see <http://culturalorganizing.org/the-problem-with-that-equity-vs-equality-graphic/>

While doing some work for the Family Leadership Design Collaborative, Paul Kuttner of the University Neighborhood Partners (UNP) at the University of Utah, received a challenge from a colleague to redesign the graphic that is often used to illustrate the difference between equity and equality.



In the first of two images, all three people have one crate to stand on. In other words, there is “equality,” because everyone has the same number of crates. While this is helpful for the middle-height person, it is not enough for the shortest and superfluous for the tallest. In contrast, in the second image there is “equity” — each person has the number of crates they need to fully enjoy the game.

The distinction between equity and equality is an important one. For example, if we’re talking about school funding, advocating for equality would mean ensuring that all schools had the same amount of resources per pupil (an

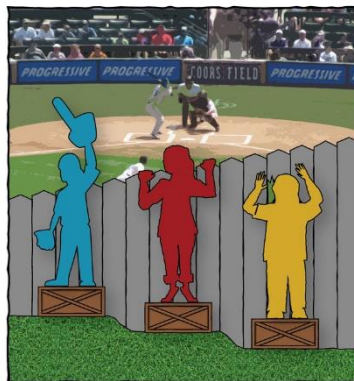
improvement in most cases, to be sure). On the other hand, advocating for equity would mean recognizing that some schools — like those serving students in low-income Communities of Color — will actually need more resources (funding, experienced teachers, relevant curriculum, etc.) if we are going to make a dent in the educational disparities that have come to be known as the “achievement gap.”

The problem with the graphic has to do with where the initial inequity is located. In the graphic, some people need more support to see over the fence because they are shorter, an issue inherent to the people themselves. That’s fine if we’re talking about height, but if this is supposed to be a metaphor for other inequities, it becomes problematic. For instance, if we return to the school funding example, this image implies that students in low-income Communities of Color and other marginalized communities need more resources in their schools because they are inherently less academically capable. They (or their families, or their communities) are metaphorically “shorter” and need more support. But that is not why the so-called “achievement gap” exists. As many have argued, it should actually be termed the “opportunity gap” because the problem is not in the abilities of students, but in the disparate opportunities they are afforded. It is rooted in a history of oppression, from colonization and slavery to “separate but equal” and redlining. It is sustained by systemic racism and the country’s ever-growing economic inequality.

This metaphor is actually a great example of deficit thinking — an ideology that blames victims of oppression for their own situation. As with this image, deficit thinking makes systemic forms of racism and oppression invisible.

Other images, like the one of different animals having to climb a tree, or of people picking fruit, suffer from the same problem. How would we make these root causes more visible in our “equity vs. equality” image?

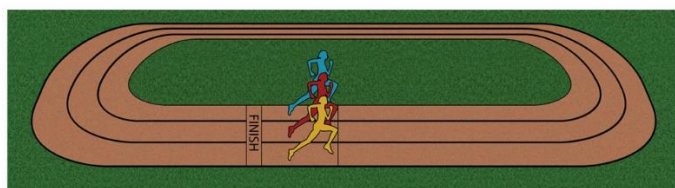
Kuttner continues in the article to look at alternative approaches to redesign the graphic. In one set, he changed the height of the fence and included unlevel ground to illustrate that some people have more difficulty seeing than others is not because of their height, but because of the context around them.



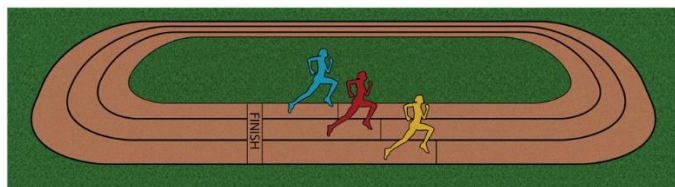
EQUALITY



EQUITY



EQUALITY



EQUITY

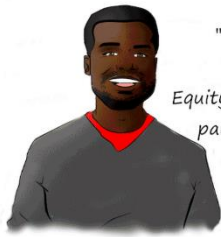
In another version, he used a race track. On an oval track, the outer lanes are actually longer than the inner lanes. If everyone started at the same place, some would have to run farther than others. So, naturally, we start runners at different places along the track. Here’s a mock-up of this metaphor, though it assumes that you already know about the different lengths of each lane. That being said, the author doesn’t feel that the idea of life as a “race” is very appealing either.

The Meyer Memorial Trust and Northwest Health Foundation had similar concerns, so they launched the Equity Illustrated contest, asking Oregonian artists to take up the challenge.

First place winner Salomé Chimuku rejected the simple metaphoric approach all together, noting that “equity isn’t about watching baseball.” Instead she offers a series of cartoon portraits of friends, with quotes from each illustrating a different aspect of equity. The result has the quality of a conversation. Chimuku’s illustrations are included on the next page.

Paul Kuttner is an educator, organizer, and scholar, interested in community-based and culturally-rooted approaches to education and social change. Paul is currently working at University Neighborhood Partners (UNP) at the University of Utah, where he builds university-community partnerships that promote educational equity, access, and justice, and produce valuable knowledge that advances scholarship. Besides being an author, Paul is a board member at the Mestizo Institute of Culture and Arts, and the “Minister of Cultural Scholarship” for the US Department of Arts and Culture. Paul received his doctorate from the Harvard Graduate School of Education, prior to which he worked as a community-based teaching artist in organizations and schools across Chicago. To find more of Paul’s writing visit <https://utah.academia.edu/PaulKuttner>

What is "Equity"?



"Hi! This illustration is to help you understand what equity means. Equity is a big concept with a lot of moving parts, so I brought some friends along to help...."



Equity isn't about watching baseball."

"This is because these are not games, but the lives of human beings, you know what I'm saying? 'Cause nobody got time for that grade school understanding."



"Think of privilege as a tool, and experience as materials. Privilege, like tools, can be used to build something or to destroy. Your experiences can be rubble or building materials."

"Equity is a home. Not like a physical house ...but rather a home. Cause that's more metaphorical to a sense of belonging and stuff, yeah? Yeah."



"We have to *build* towards equity. It takes both; people using their privileges and others using their experiences."

"Now, some of y'all got more privilege than others and that's ok. But just remember, when you ain't using your privilege as a fool, you are using it as a weapon."



"Equity, like a home, is a human right. Lifting barriers, restoring rights, and protecting those most vulnerable is just maintenance."

"Everyone needs to help maintain this home we call equity, because it only works when everyone does their share. Don't make me name names."



"Equity requires on-going work, but it's a home we will pass on to future generations."

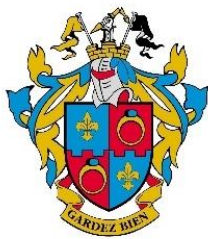


OLO Report: Racial Equity in Government Decision Making: Lessons from the Field



Report Number 2018-8

September 25, 2018



Racial Equity in Government Decision-Making: Lessons from the Field

Elaine Bonner-Tompkins
Victoria H. Hall

 **OFFICE OF LEGISLATIVE OVERSIGHT**

Racial Equity in Government Decision-Making

Executive Summary of OLO Report Number 2018-8

September 25, 2018

Summary: This report describes promising practices for advancing racial equity in government decision-making based on a review of the research and local practices. Four findings emerge from OLO's review:

- Racial disparities are pervasive, creating burdens for communities and people of color.
- Narrowing racial disparities requires focused attention on race, addressing institutional racism, and public policies and practices targeting institutions and systems rather than individuals
- Best practices for advancing racial equity suggest that local governments jurisdictions should focus on three goals: normalizing, organizing, and operationalizing for racial equity.
- Leading jurisdictions have taken multi-pronged approaches to advancing racial equity that align with best practices. However, there is no one way for jurisdictions to advance racial equity.

Based on these findings, OLO offers a list of short-to-medium-term and long-term recommendations for County action to prioritize racial equity in government decision-making in Montgomery County.

Racial Disparities and Their Costs

Racial disparities are pervasive across systems, characterizing most measures of wellbeing and risk. As noted by the Racial Equity Institute, measures of disproportionality reflecting the over-representation of people of color on measures of disadvantage occur in child welfare, health, juvenile justice, education, and economic development. A review of local data demonstrates disparities by race and ethnicity on measures of education, employment, housing, and income as summarized in the table below.

**Relative Risk Index of Asian, Black, and Latino Residents Experiencing an Outcome
Relative to a White Resident in Montgomery County, 2011-2015**

System	Outcomes	White	Asian	Black	Latino
Education	High school completion rate = 98%	100%	94%	94%	70%
	Some college education = 88%	100%	92%	82%	51%
Employment	Employment rate = 78%	100%	97%	94%	99%
	Unemployment rate = 4%	100%	125%	250%	200%
Housing and Income	Households owned their own home = 74%	100%	99%	59%	67%
	Average Household Income = \$160,000	100%	82%	55%	55%
	Residents living in poverty = 4%	100%	150%	275%	300%
	Children living in poverty = 2%	100%	300%	800%	700%
Sources: OLO analysis of 2011-15 Census Data compiled by L. Hendey and L. Posey, Racial Inequities in Montgomery County, 2011-15 (The Urban Institute, 2017); https://www.urban.org/sites/default/files/publication/95386/2017.12.28_montgomery_county_finalized_6.pdf					

Local data shows that despite high rates of high school completion (70%-98%) and employment (73%-78%) among all groups, Blacks and Latinos were more than twice as likely as Whites to be unemployed and have household incomes below the federal poverty level. Blacks and Latinos were also 33-41% less likely to own their homes and Black and Latino children were 6-7 times more likely to live in poverty.

The Urban Institute estimates that a more equitable Montgomery County would have increased the numbers of Latino, African American, and Asian residents with high school degrees, college educations, and higher incomes. Research also suggests that increasing equitable outcomes among communities of color stimulates economic growth that benefits communities overall. For example, PolicyLink’s Equitable Growth Profile for Fairfax County estimates that eliminating disparities in incomes by race and ethnicity would have increased their County’s gross domestic product by \$26.2 billion in 2012.¹

Focusing on Institutional Racism to Advance Racial Equity

The Government Alliance for Race and Equity (GARE) finds that racial disparities evident across measures are often “explained by blaming individual people - promoting “hard work” as the way to get ahead.”² They note that hard work can help, but because underlying systems are the force driving racial inequities, they encourage localities to focus on structural transformation to reduce racial disparities.

Focusing on structural transformation requires understanding the difference between *individual racism* (racism occurring between individuals) and *institutional racism* (biases within and across institutions that advantage White people over people of color). It also requires understanding how *implicit bias* (unconscious beliefs about race) is replicated through collective decisions and actions within institutions. GARE’s matrix offers a reference for considering the distinction between implicit and explicit racism among individuals and institutions. It also offers context for why GARE focuses on institutional implicit bias – “the hidden forces at work in our institutions ... where structural transformation must happen.”³

Matrix of Explicit and Implicit Bias and Individual and Institutional Racism

	Individual Racism/Bias	Institutional Racism/Bias
Explicit Bias	When people think of racism, they often think of individual, explicit racism.	After instituting explicitly racist laws and policies, government has focused on fixing explicitly racist laws and policies.
Implicit Bias	When many people think about how to fix racism, they think we need to change minds, one by one, getting rid of implicit bias.	GARE focuses efforts on the hidden forces at work in our institutions – this is where structural transformation is necessary to end racial disparities.

Best Practices for Advancing Racial Equity

Based on their work to advance racial equity in more than 100 local jurisdictions, GARE offers three sets of best practices for local jurisdictions advancing racial equity as a priority:

- **Normalize** conversations about race equity by **(1) using racial equity frameworks** that describe the history of government in creating racial disparities, envision a new role for government, and use clear definitions of racial equity and inequity; and **(2) communicating and acting with urgency** by having local leaders agree on the value of prioritizing racial equity, develop a vision, and communicate their commitment, vision, and actions to the community.

¹ <https://nationalequityatlas.org/sites/default/files/Fairfax-Profile-6June2015-final.pdf>

² <https://www.racialequityalliance.org/wp-content/uploads/2018/05/1-052018-GARE-Comms-Guide-v1-1.pdf>

³ *Ibid* p. 39

- **Organize** for racial equity by **(1) building organizational capacity** to advance equity by training staff to understand institutional racism and how to use racial equity tools, and organizing staff to develop expertise at applying a racial equity lens to local decision-making; and **(2) engaging communities** to advance racial equity, particularly among communities of color.
- **Operationalize** for racial equity by **(1) using racial equity tools** that enable decision-makers to evaluate current and proposed policies, programs, and practices using a racial equity lens; and **(2) using data via measurement frameworks** to establish baseline data on indicators of disparities and evaluate the success of local efforts to advance racial equity.

Promising Practices in Other Jurisdictions

OLO reviewed efforts among seven jurisdictions for advancing racial equity in government:

- Seattle and King County, Washington;
- Portland and Multnomah County, Oregon;
- Madison and Dane County, Wisconsin; and
- Fairfax County, Virginia.

<u>What Have Leading Jurisdictions Done to Advance Racial Equity in Decision-Making?</u>	
<u>Normalize</u> <ul style="list-style-type: none"> • Training • Act with Urgency 	<ul style="list-style-type: none"> • Train employees to create a shared understanding using racial equity frameworks (<i>Madison, Seattle, Portland</i>) • Develop public education campaign and website on equity efforts (<i>Seattle</i>) • Issue annual report on racial equity work (<i>Portland</i>) • Collaborate on racial equity with national and regional communities of practice (<i>Seattle, King County, Fairfax County</i>)
<u>Organize</u> <ul style="list-style-type: none"> • Staffing • Planning • Community Engagement 	<ul style="list-style-type: none"> • Hire/Designate Chief Equity Officer (<i>Fairfax County</i>) • Create jurisdiction-wide, departmental, and topical racial equity action teams (<i>Seattle, Madison, King County, Dane County</i>) • Designate/create lead department for racial equity work (<i>Dane County, King County, Seattle, Portland, Multnomah County</i>) • Develop jurisdiction-wide strategic plan for racial equity (<i>Seattle, King County, Dane County, and Portland</i>) • Identify equity target areas and policies (<i>Seattle, King County, Portland</i>) • Develop racial equity plans by department (<i>Portland, King County, Madison</i>) • Develop tools to enhance community engagement (<i>Madison, Seattle</i>) • Host community conversations/town halls on racial equity (<i>King County, Fairfax County, Multnomah County</i>) • Engage underrepresented communities (<i>Seattle</i>) • Create Racial Equity Funds for community-based organizations (<i>Seattle</i>)
<u>Operationalize</u> <ul style="list-style-type: none"> • Equity Tools • Data 	<ul style="list-style-type: none"> • Develop racial equity impact assessments and racial equity toolkits (<i>Seattle, Multnomah County, Portland, and Madison</i>) • Require use of equity tools in governmental decision-making (<i>Portland, Dane County, Madison</i>) • Compile data on racial and social disparities (<i>Fairfax County</i>) • Develop performance measures for improving equity (<i>Dane County</i>)

The seven jurisdictions' combined efforts align with GARE's recommended best practices. Several jurisdictions have also developed strategic plans for racial equity and require local departments to develop and implement **racial equity action plans**. To support their work, several localities rely on lead agencies (e.g. Offices of Civil Rights and Equity) to coordinate their equity efforts. Together, they demonstrate that there is no one way for jurisdictions to advance racial equity.

OLO Recommendations

OLO offers a list of recommendations for Council and Executive Branch action for prioritizing racial equity in government decision-making based on this report's findings. OLO's recommendations reflect a menu of approaches rather than a prescription. Beyond initial training for elected officials and staff leaders to create a common vision for racial equity locally, OLO recommends the formation of Legislative and Executive Branch Racial Equity Action Teams to determine next steps.

Recommendations for County Action in the Short-Term to Medium-Term (6 Months to Two Years)

- Leadership Training on Racial Equity
- Join Communities of Practice (Government Alliance for Race and Equity, regional network)
- Hire/Designate Equity Chief and Coordinating Department
- Develop Racial Equity Action Teams
- Develop Vision, Mission, and Goals
- Identify Racial Equity Focus Areas (e.g. policy areas, neighborhoods)
- Develop and Pilot Racial Equity Tools
- Compile Data on Disparities and Performance Metrics
- Develop Departmental Racial Equity Action Teams
- Develop Countywide Racial Equity Strategic Plan
- Develop and Implement Strategies to Promote Community Engagement
- Launch Public Education Campaign
- Review Policies for Racial Equity
- Develop Process for Evaluating Equity Efforts

Recommendations for County Action in the Long-Term (Two or More Years)

- Mandate Training for Racial Equity Teams, Managers, and Supervisors
- Require Departmental Racial Equity Action Plans
- Require Use of Equity Tools
- Expand Public Education Campaign
- Launch Community Engagement Committee
- Advance Equitable Policies
- Evaluate Data for Accountability

For a complete copy of OLO-Report 2018-8, go to:

<http://www.montgomerycountymd.gov/OLO/Reports/CurrentOLOReports.html>

Racial Equity and Social Justice Initiative Timeline



Decisions are being made by local government without a full picture of how these decisions impact unrepresented communities experiencing inequities across the county. These decisions impact education, housing, health care, transportation and more. A racial equity and social justice policy are needed so that county government decisions can be made through a racial equity lens.

Montgomery County leaders recognize that government at all levels has helped to create and maintain systematic racial inequality. These same leaders and community members have committed themselves to envisioning and operationalizing policies to institutionalize new models of governing that uses the lessons of the past to create a more equitable future. ("County leaders stand united to create a Racial Equity and Social Justice Policy for Montgomery County Government," Montgomery County Council Press Release, March 13, 2019)

Timeline

Source: Elaine Bonner-Tompkins, Ph.D., Senior Legislative Analyst, Office of Legislative Oversight, Montgomery County, Maryland, March 5, 2019

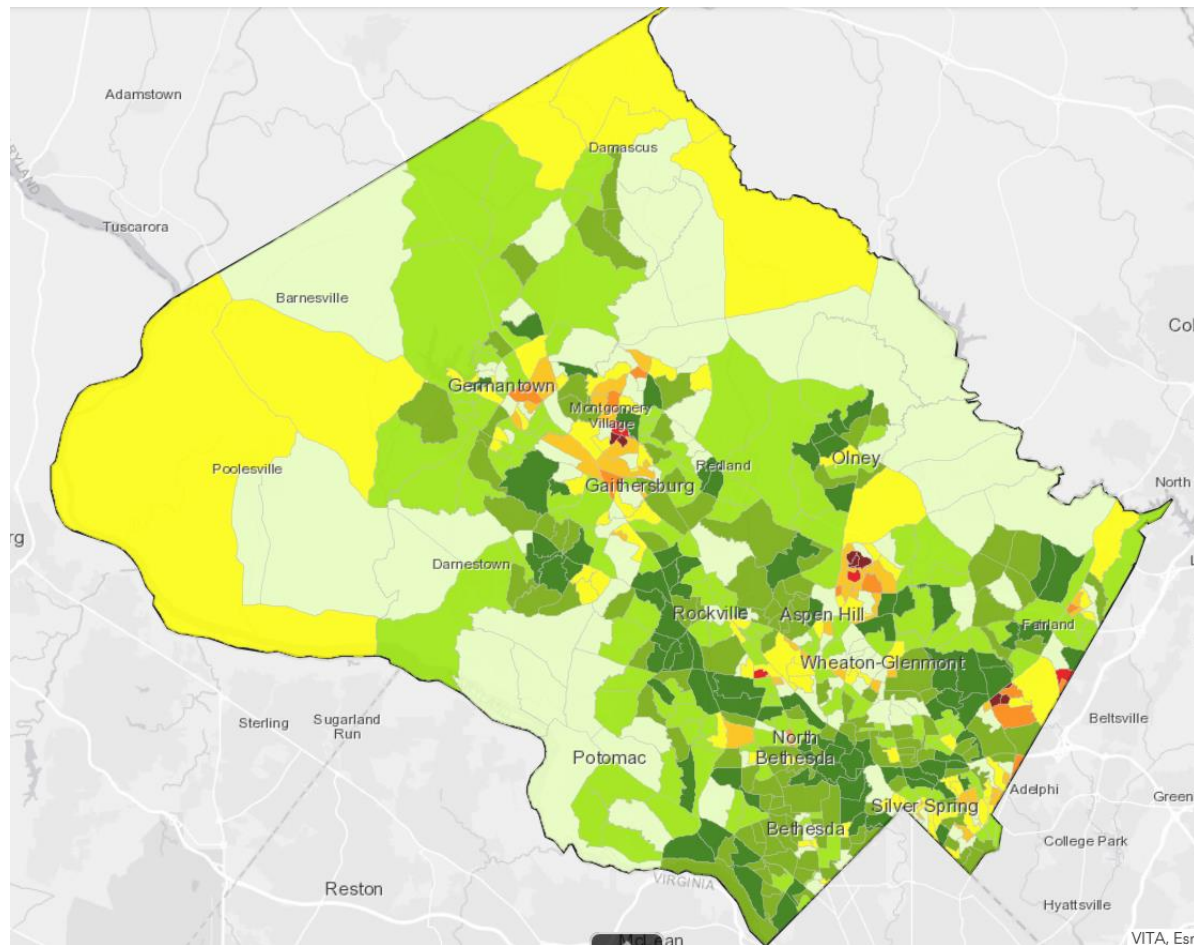
- April 24, 2018, Resolution 18-1095 adopted affirming the Council's commitment to creating a Racial Equity and Social Justice Policy for Montgomery County
- September 25, 2018, release of Office of Legislative Oversight Report 2018-8, Racial Equity in Government Decision-Making: Lessons from the Field
- January 10-11, 2019, Racial Equity Training for County Leadership
- February 12, 2019, Racial Equity Training Debrief for County Leadership
- March 13, 2019, Kick off Racial Equity and Social Justice Community Engagement Campaign with press conference and community conversation at the Silver Spring Civic Building
- April 1, 2019, Launch of Community Survey and Community Conversations on Racial Equity and Social Justice
- April 8, 2017, Youth Forum on Racial Equity and Social Justice
- June 11, 2019, Council meeting on Racial Equity and Social Justice

- Spring/Summer 2019
 - Community Conversations through July 15, 2019
 - Release of baseline report describing disparities by race and ethnicity in education, employment, housing, health, criminal justice and other measures of opportunity
 - County Council starts work on developing Racial Equity and Social Justice Policy legislation
- Fall 2019
 - Public hearing on proposed Racial Equity and Social Justice Policy
 - Pass legislation enacting Racial Equity and Social Justice Policy



These in addition the other CIP prioritizing tools in the CIP, these base maps provide insight to areas that minority dominant, low income, and have a low park equity score as per Pros 2017

Park Equity Score



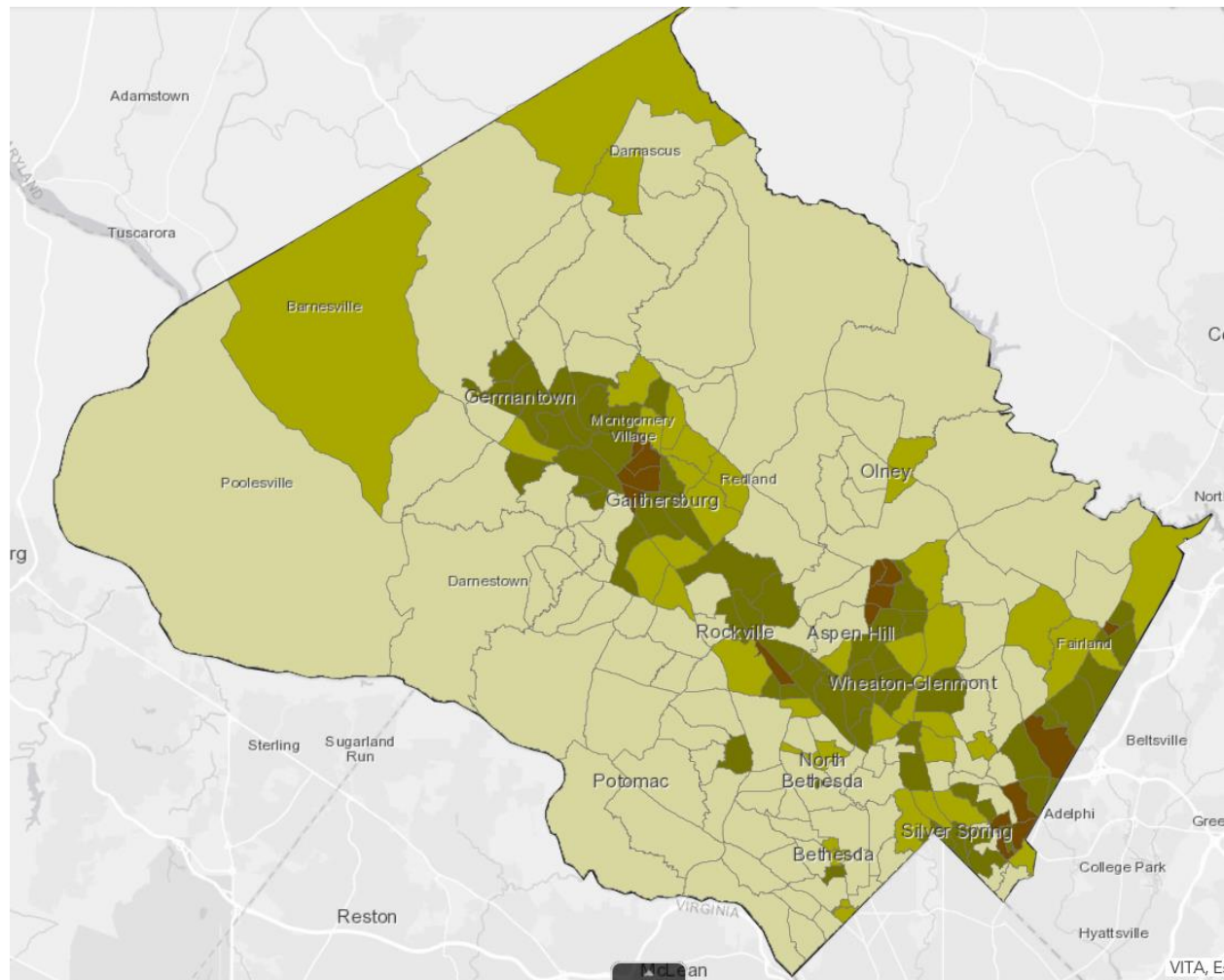
Legend

Park Equity Index

- 1: Least Park Equity Concern
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9: Greatest Park Equity Concern

The Park Equity Map was designed to identify high concentrations of lower income households with low walkable access to park entrances and trailheads. This map depicts an index of three factors: Population Density, Median Household Income as a percent of Area Median Income, and Walkable Access to Parks and Trailheads.

Percent Area Median Income



Legend

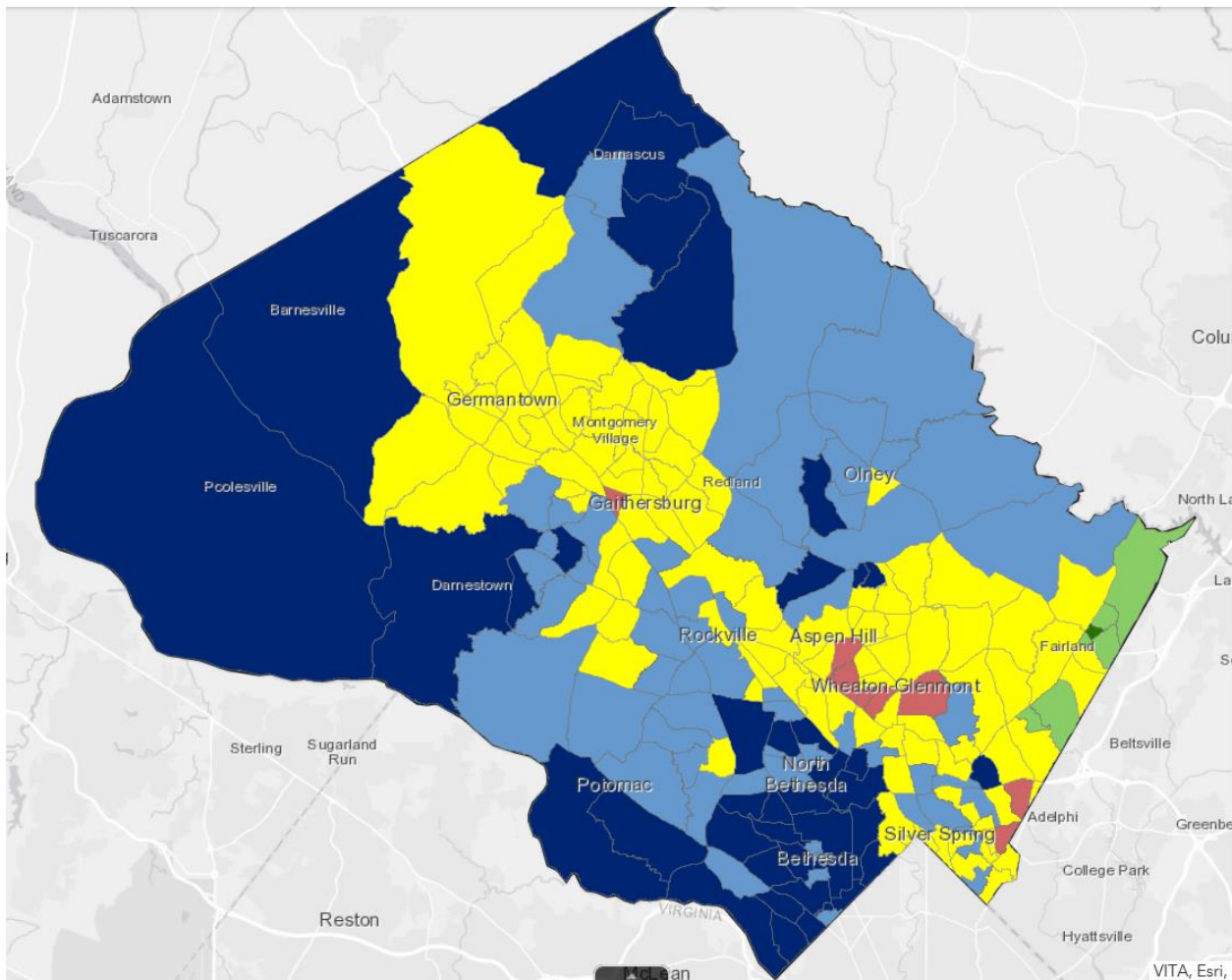
Percent Area Median Income

Percent Area Median Income

- 100% and higher AMI --Areas of Least Concern
- 81% - 100% AMI
- 51% - 80% AMI
- 39% - 50% AMI --Areas of Greatest Concern

Montgomery County, MD has a population of 1.04M people with a median age of 39 and a median household income of \$99,763.

Racial and Ethnic Predominance



Legend

Racial and Ethnicity Data

- White Predominant (>70% of tract population)
- White Majority (50% - 70%)
- Black Predominant (>70%)
- Black Majority (50% - 70%)
- Hispanic Majority (50% - 70%)
- No predominant group (no group with more than 50%)

Areas of red and green indicate areas of minority population predominance.