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

Equity in Master Planning Framework

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Staff Recommendation
Brief the Planning Board on the equity in master planning approach and framework.

Summary
The Montgomery County Planning Department aspires to provide quality service to current and future stakeholders. Therefore, we must incorporate racial equity and social justice when preparing Master Plans, use current best practices to analyze adverse impacts on the community, strengthen our partnerships with stakeholders, and continue to address the present-day challenges on a regional scale.

Fulfilling this vision and in response to Montgomery County's Racial Equity and Social Justice Act 27-19, adopted on March 2, 2020, a Planning Department work group developed a draft action plan for incorporating racial equity and social justice when preparing a Master Plan or Functional Plan. The draft action plan primarily focuses on Master and Functional Plans, but also includes other Departmental equity initiatives.

Equity in Master Planning – Draft Action Plan
June 25, 2020

Background
The Racial Equity and Social Justice Act, 27-19, was signed into law by the Montgomery County Council by a unanimous vote on December 2, 2019 and went into effect on March 2, 2020. The Act reinforces the county government's commitment to be a welcoming community where all residents are treated with respect and dignity and provided with opportunities to succeed. The Act established a Racial Equity and Social Justice Program that will be implemented across county government by a new office in the executive branch. The following is an excerpt from the law that requires the Planning Board to consider racial equity and social justice impact when preparing a Master Plan:

AN ACT to: (1) (2) (3) (4) (5) (6) (7) (8) (9) Establish a racial equity and social justice program; establish an Office of Racial Equity and Social Justice in the Executive Branch; remove the Chief Equity Officer position in the Office of the Executive as a non-merit position; require the Executive to adopt, by Method 2 regulation, a racial equity and social justice action plan for the County; require each Department and Office to develop a racial equity and social justice action plan; require the Executive to submit a racial equity and social justice impact statement to the Council for each Bill and for each management initiative or program in the recommended budget; establish a Racial Equity and Social Justice Advisory Committee and set forth the composition and duties of the Committee; **require the Planning Board to consider racial equity and social justice impact when preparing a Master Plan***; and generally amend the law governing racial equity and social justice.*

Link to 27-19: https://www.montgomerycountymd.gov/COUNCIL/Resources/Files/RacialEquity/Bill27-19.pdf

Definitions
The following terms are used throughout the Equity in Master Planning Action Plan and are defined below.

Equity: just and fair inclusion into a society where all can participate and prosper. The goal of equity must be to create conditions that allow all to reach their full potential. This definition was originated by the Montgomery County Planning Department. Equity and equality are often confused, but equality only achieves fairness if everyone starts from the same place and needs the same help. Equality may be defined as treating every individual in the same manner irrespective of needs and requirements. This action plan emphasizes equity over treating everyone the same.

Race: a social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (including color), ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the social, economic and political needs of a society at a given period. This definition is directly cited from Bill 27-19 (lines 49-53).

Social justice: everyone deserves to benefit from the same economic, political, and social rights and opportunities, free from health disparities, regardless of race, socioeconomic status, age, sex – including on the basis of gender identity or orientation, religion, disability, or other characteristics. This definition is directly cited from the Bill 27-19 (lines 62-68). In accordance with the Centers for Disease Control and

Prevention (CDC), health disparities are preventable differences that may result in multiple factors including, but not limited to environmental threats, economic development, and education. While health inequities refer to the uneven distribution of social and economic resources that impact an individual's health, inequities in health often result in disparities in health outcomes.

Racial equity and social justice: changes in policy, practice and allocation of County resources so that race or social justice constructs do not predict one's success, while also improving opportunities and outcomes for all people. This definition is cited directly from Bill 27-19 (lines 58-61).

Institutional racism: policies, practices, and procedures that work better for some individuals of a community than others, based on race. This definition is directly sited from Bill 27-19 (lines 46-48). When investigating the adverse impacts of institutional racism, intersectionality gives planners the ability to consider that individuals may hold multiple social identities that act in combination to shape an individual's experiences with privilege and/or oppression throughout society. An intersectional framework is useful to provide specific context for individuals who hold multiple social identities in the community.

Intersectionality: the examination of race, sex, class, national origin, and sexual orientation, and how their combination plays out in various settings. This definition is cited from *Delgado & Stefanic; a scholarly article.*

Action Plan Mission
Our mission as a Planning Department is to improve the quality of life in Montgomery County. In order to provide quality service to the current and future community members, we must incorporate racial equity and social justice when preparing Master Plans, use current best practices to analyze adverse impacts on the community, strengthen our partnerships with stakeholders, and continue to address the present-day challenges on a regional scale.

Action Plan Scope
The scope for the Action Plan is to document the procedure used for incorporating racial equity and social justice findings when preparing a Master Plan or Functional Plan, per Bill 27-19. The following eight action items is the recommended procedure.

Action Items

1. **View all aspects of the planning effort through an equity lens.** The Montgomery County Planning Department promotes the use of an "equity lens" for planning. ***An equity lens is a tool used to improve planning, decision-making, and resource allocation leading to more racially equitable policies and programs.*** This tool is intended to be a guide for planners to inform decision-making throughout the master planning process, and a facilitation tool to support iterative learning and process improvement throughout the community engagement, development and implementation of the planning process.

   Planning staff will work with members of historically neglected/impacted communities to identify, understand and address institutional racism and social injustices. This first step is critically important to actively ensuring that community engagement, the master plan

recommendations and planning policies are taking the necessary steps to dismantle these systematic and systemic injustices. In order to dismantle this system, planners will be intentional and bold in identifying present-day signs or indicators of institutional racism, by uncovering the history and stories from the community that need to be told. Planners will examine how the system or practice of racism influences planning policies and decision-making with specific regards to development, land use policies, zoning recommendations, and capital improvement projects.

As part of the master planning process, planners will use the equity lens tool to actively pursue recommendations and policies that seek to change the system and advance inherent human rights by altering institutional and organizational arrangements.

Drawing from resources such as the *Planning for Equity Policy Guide* (https://www.planning.org/publications/document/9178541/) by the American Planning Association and the City of Baltimore's *Urban Sustainability Directors Network*, the equity lens tool described below asks planners to consider these four overarching areas of equity from the pre-planning stages of the scope of work, to the community engagement stage, and throughout the development of a master plan's recommendations and implementation.

For any policy, topic or element addressed in a master plan, the planning team should consider and address the following questions (i.e. the Equity Lens Tool) throughout the different stages (e.g. preparation of the project's scope of work, communications plan, existing conditions, analysis, public engagement, and development of plan recommendations) of the planning process.

THE EQUITY LENS (TOOL):
- o **HISTORY AND CONTEXT:** What historic advantages or disadvantages have affected residents in the given community (land use, financial, and sociological)?
- o **ENGAGEMENT AND COMMUNICATION:** How are residents who have been excluded from planning processes being authentically included in the planning, implementation, and evaluation of the proposed policy or project?
- o **EXISTING CONDITIONS:** Does the distribution of civic resources, locally unwanted land uses ("LULUs"), and capital investment projects explicitly account for potential disparate outcomes for different groups and neighborhoods? How can we change these outcomes moving forward?
- o **FUTURE OUTCOMES:** Does the current policy or project help or hinder the equitable distribution of civic resources, LULUs, and capital investments for future generations? How can we address this today to provide for a more equitable future?

The Equity Lens Tool is an evolving tool that will be modified and updated as necessary to incorporate lessons learned from the field. As planners of all disciplines consider and address these questions throughout the planning process, the community's responses to these questions will be used to inform the direction of staff recommendations within the plan document. Master Plan recommendations will reflect the community's responses to the Equity Lens Tool. Prior to finalizing any plan recommendations, the planning team will seek feedback from the Equity Peer Review Group, which is listed as action item eight within this document.

2. **Develop an Equity Opportunity Index.** This project, to be developed in-house and led by the Research and Special Projects Division, would build on the equity work in the General Plan to determine how to bring racial equity and social justice considerations into the master planning process and develop methods to facilitate these considerations. The analytical methods and tools will examine factors contributing to an equitable county such as the socio-economic conditions, access to transportation, and social determinants for healthy communities. Methods will be established for benchmarking equity and measuring outcomes in local plans and countywide. Analysis of how growth strategies, development and transportation projects may affect marginalized populations will be explored. For example, the City of Seattle developed composite displacement risk and opportunity access indices that have helped the city make decisions about growth and assess investment strategies to maximize equitable development. The American Association of Retired Persons (AARP) has also developed a Livability Index on a national scale that is a helpful tool not only for senior adults, but also the general population.

   Timeframe: July 2020 - July 2021

3. **Develop Community Equity Emphasis Areas (CEEA).** The Equity Working Group for Thrive Montgomery 2050 Plan is developing a model to identify Community Equity Emphasis Areas for analysis of racial equity and social justice issues for the General Plan discussion and as a guide for the Parks Department to prioritize capital improvement projects. The approach confines the scope to income, race and ethnicity, and limited English language skills to define CEEAs. The map of CEEAs and the accompanying demographic characteristics will be available for master plan analysis of local issues. This tool will assist with analysis of CEEAs' access to opportunity and resources, for example employment, transportation, education, social determinants of healthy communities, and government services. The CEEAs provide a stopgap equity analysis until the more robust Equity Opportunity index is completed.

   Timeframe: March 2020 - September 2020

4. **Complete a Racial Equity and Social Justice Timeline.** Historic Preservation and Research & Special Projects staff are developing a historical timeline documenting important events pertaining to racial equity and social justice for Montgomery County. This historic timeline will highlight the impacts of previous planning efforts to learn from the past and prevent repeating mistakes in the future. This timeline could be included in all Master Plans as it relates to the historical context and the historic advantages or disadvantages that have affected residents in the community. *The scope of the timeline will be depending on resources and funding available for this effort.*

   Timeframe: Ongoing

5. **Conduct Staff Equity Trainings.** All staff must complete racial equity training on developing master plans with an equity lens. These trainings, coordinated by Human Resources, will focus on giving planners the education and tools they need to thoughtfully participate in public engagement efforts with the community. The trainings also teach planners how to use the tools described herein.

a. Outcome No. 1: Planners will learn about the history of racial inequity and social injustice and the role of land use planning in creating or perpetuating these systems.
b. Outcome No. 2: Planners will be equipped with the tools they need to write policies, reach diverse audiences, and prepare recommendations for master plans that are equitable. This outcome includes the ability to analyze hard and soft data through an equity lens.
c. Outcome No. 3: Planners will learn the art of building trust and talking about tough issues the community may bring up, or be experiencing, etc. Planners will be trained to impart their knowledge to the community (regarding the master planning process), work directly with the community to empower members of the community to participate in the planning process, and engage members of the community to become partners in the decision-making process during the visioning and development of master planning policies and recommendations.

Timeframe: Ongoing

6. **Continue to provide expansive demographic research and data points for each plan area.** The hard and soft data produced from regional and county studies (reports and the US Census data) will be carefully analyzed, and our findings will be incorporated into our master plans to track equitable progress within the respective plan area. This includes:
   a. Demographic, housing, and economic data checklist for each plan or study. This information will be useful for developing a communications strategy and serve as a benchmark for assessing the progress of equitable initiatives in a master plan.
   b. Staff training on how to analyze hard and soft data through an equity lens.

Timeframe: Checklist completed by September 2020, Ongoing staff training

7. **For each master plan, develop a community engagement strategy addressing racial equity and social justice**. A joint effort by Communications and Planning staff creates an overarching approach to community engagement and devises methods tailored to the specific master or functional plan. Reference the Community Engagement Policies and Actions identified in the draft Thrive Montgomery 2050 Plan for guidance. The Equity in Planning work group could be used as a resource to Staff when reviewing presentations to the public and marketing materials in similar format as Peer Review. Staff from the Equity in Planning work group could rotate their review cycles.

Timeframe: Ongoing

8. **Equity Peer Review Group.** The purpose of this group is to provide necessary feedback on staff recommendations, planning policies, and community engagement strategies. This includes a review of plan imagery, terminology, and accessibility. This group will include at a minimum a Master Plan Supervisor, a Transportation Planner with Vision Zero County-wide initiative experience, an Environmental Planner, and members from our Legal, Historic Preservation and Research & Special Projects Divisions. The function of this group is like the existing peer review groups for development review and urban design. All staff representatives will be active

participants in equity trainings to ensure the continuation of best practices on a national and local scale.

Timeframe: Ongoing

Attachment:
Other Departmental Equity in Planning Work

Attachment: Other Departmental Equity in Planning Work

The following action items are also being implemented. This list will continue to evolve as new information and better opportunities become available.

1. **Coordinate with national and regional resources.** Montgomery Planning is exploring external resources such as the Government Alliance on Race and Equity (GARE) and the APA Planning for Equity Policy Guide in order to stay up to date on best practices. The Montgomery County Planning Department is a member of both GARE and the Urban Sustainability Directors Network (USDN) which provides expert knowledge and training on a national scale.

2. **Diversity & Inclusion Study.** In 2019, the Maryland–National Capital Park and Planning Commission (M-NCPPC) launched a Planner Diversity and Inclusion Assessment study focused on providing equity in the workplace. The study focuses on personnel policies and practices and employment of planners at the Planning and Parks departments in Prince George's and Montgomery counties. The results of this study will support our ongoing efforts to keep pace with the changing demographics of Montgomery County. Racial equity and social justice will also be included in our hiring practices to ensure that we have an inclusive and fully diversified work environment at all levels. When our workforce more closely resembles the makeup of the County, our staff not only benefits from a wider range of lived experiences, but those individuals also possess the necessary skills to help bridge gaps and earn trust. The Planning Department becomes more capable of developing Master Plans that better meet the needs of the communities we serve.

3. **Explore developing a historical "Redlining" Mapping Tool.** Staff from the Equity Working Group for the General Plan and Historic Preservation are developing the initial data foundation for identifying neighborhoods that may have been subjected to restrictive lending practices or racial and religious covenants. Federal Housing Administration (FHA) residential security maps from 1936 are key resources for analysis, but the local data only extends north from DC to the down-county areas near the Capital Beltway. A proxy for potential areas subject to redline lending practices outside the FHA coverage is being developed. The historical redlining mapping tool will be used to examine the association between the FHA residential security classifications from the 1930s, and the current economic and demographic status of neighborhoods to determine whether a persistent pattern of economic inequality and segregation exists. Several examples of subdivisions with discriminatory racial and religious covenants will be documented with historical pictures and land records. NOTE: *A consultant is needed for this effort to assist with gathering the historical information and grounding maps that are developed for Montgomery County.*

4. **Development Review Navigators.** Designated staff in the Development Applications and Regulatory Coordination (DARC) Division Intake Section are providing a new service to applicants that are not as familiar with our development review process and regulations (https://montgomeryplanning.org/development/development-review-navigators/). These services were originally created to meet the needs of smaller developers, thereby possibly

eliminating barriers to entry into real estate development (the implementation of an equitable approach to building wealth). Planners could also use this opportunity to reference other similar programs (e.g. Planning for People), exchange ideas and information with other jurisdictions, and refine our current development review processes. For example, the City of Baltimore is a good resource to coordinate with in this effort. The Department of Housing & Community Development (DHCD) was created in 1968 for the City of Baltimore to consolidate local community efforts with housing and building code enforcement (https://dhcd.baltimorecity.gov/m/about).

DHCD is a good example for strategic planning. As the economy evolves, history teaches us that as development costs become more expensive, community developers (meaning developers that seek to make smaller improvements like adaptive reuse) in Montgomery County will likely trend upward. We could use this program to proactively respond to future market demands.

5. **Historic Preservation (HP@40).** In FY21, the Historic Preservation section will create in-house a comprehensive evaluation of the County's historic preservation program with an equity lens. Entitled **HP@40**, in recognition of the 40 years since the adoption of the original Master Plan for Historic Preservation (1979), this project includes an evaluation and analysis of the 40-year history of the County's Historic Preservation program through the lens of equity and environmental sustainability. Project deliverables will include:
   a. A list/annotated bibliography of all the County's adopted historic preservation/cultural resources-focused plans, guidelines, ordinances and policies;
   b. An analysis showing how these resources build on or inform other adopted functional plans, area plans, policies, and ordinances; and,
   c. Research to determine opportunities for expanding historic preservation program tools into other policy or planning areas.

The Historic Preservation Office will use existing staff resources to examine the range and types of architectural, historical, cultural, and archaeological resources that have been surveyed and listed on the Master Plan for Historic Preservation to determine what histories are over- and under-represented and to examine the full range of resources from an equity perspective. Staff will also review other efforts occurring at the national, state and local levels across the country involving cultural resources such as sustainability, disaster and hazard mitigation planning, heritage tourism/agritourism, and other topics to be identified. Future work for this initiative could include programs for outreach and education, mapping, and programmatic archival research.

6. **Thrive Montgomery Plan 2050.** The Thrive Montgomery Plan 2050 is Montgomery County's General Plan Update. The original document (adopted in 1969) did not explicitly explore the concept of applying an equity lens to planning policies. The Thrive Montgomery Plan explicitly designates equity as one of three major themes throughout the document and proposes several policies that support the Racial Equity and Social Justice Bill 27-19 (e.g. connectedness, complete communities, environmental justice, etc.).