



2025 EQUITY IN BUDGETING PLAYBOOK

**PREPARED BY THE CHANGE TEAM'S
EQUITY IN BUDGETING COMMITTEE**

OVERVIEW OF PLAYBOOK

The Port of Seattle's **Equity in Budgeting Playbook (EBP)** is designed to integrate explicit considerations of racial equity into decisions, including policies, practices, programs, and ultimately, Departmental budgets. Using this tool will help you develop strategies and actions that reduce inequities, with a particular focus on racial inequities, and improve success for everyone.

The EBP is both a product and a process. At the Division level, this playbook creates a process for the organization to measure how much we are spending to advance equity, and all Divisions must submit information about budget items that qualify as **equity spending** according to specific criterion (see page 5). This gives the organization a better understanding of how our budget is contributing to our equity goals, and it tells the story of the specific areas that we are investing in to advance equity.

Following the Commission's [Equity Policy Directive](#) issued in the spring of 2023, a cross-departmental team worked together to develop a specific definition for equity spending. This team then worked with all departments to conduct a review of spending items from the past four years to measure the percentage of Port expenses that met the equity spending definition. The team also worked to separate equity spending into distinct categories to tell a more complete story of what investments we are making with the goal of advancing equity, diversity, and inclusion. This work is now referred to as the Equity Spending and Accountability Initiative (ESAP) and will serve as a baseline for tracking our progress in subsequent budget cycles, and you can access this analysis in the Equity Spending [Dashboard](#).

At the Department level, this playbook includes a set of questions to guide Port Departments in assessing how budget requests align with and advance department equity goals, meet employee training and development needs, and incorporate the input of employees and communities into the budgeting process. Use of the EBP aligns with the Port's Century Agenda Goal 5, the Executive Director Priorities, our R.A.I.S.E values, and the recommendations of the 2021 Equity Assessment.

In 2021, the Port's first [Budgeting with Equity Tool](#) was incorporated into the 2022 departmental budgeting process, and in subsequent years, this tool has been improved and updated. This 2025 playbook is the latest iteration of this tool and will be used to inform our 2025 budgets.

We Lead with Racial Equity

The Port defines **equity** as the fair treatment, access, opportunity, and advancement for all people while striving to identify and eliminate barriers that have prevented the full participation of communities historically oppressed. Improving equity involves increasing justice and fairness with the procedures and processes of institutions or systems and a fair, intentional distribution of resources.

Racial equity is when race is no longer a predictor of life outcomes and outcomes for all groups are improved. We lead our equity work with a focus on racial equity because racial oppression is so foundational to our country's origins — from mass exploitation of Native American populations to the enslavement of Black Americans — and it forms the language, logic, and structure for all types of discrimination. Additionally, leading with racial equity allows us to have a specific, strategic focus that we can use to develop structural approaches for all forms of oppression.

While we lead this work with a focus on racial equity, we know that racism is not the only inequity we need to address. We value an intersectional approach to our efforts to advance equity. **Intersectionality** is a framework for understanding how aspects of a person's or group's social identities combine to create varying degrees of advantage and disadvantage. The Port's [Women of Color Assessment](#) is an example of an intersectional approach to advancing equity, understanding the experiences, disadvantages, and barriers that are created at the intersection of race and gender.

How Does Equity Relate to Budgeting?

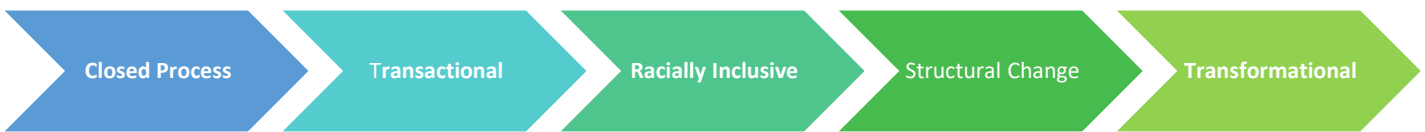
Our budget is both a fiscal and moral document. It reflects our priorities and values – both to the communities we serve and to ourselves.

The mission of the Port of Seattle is to promote economic opportunities and quality of life in the region by advancing trade, travel, commerce, and job creation in an equitable, accountable, and environmentally responsible manner. The Port’s values are respect, anti-racism and equity, integrity, stewardship, and excellence (aka R.A.I.S.E.). And, the Port has a Century Agenda goal, among other goals, of becoming a “model of equity, diversity, and inclusion.” **Our budget should reflect all of this.**

Additionally, we know bias and oppression are embedded in our society, systems, and our organization. If we fail to acknowledge this and thus fail to account for it, we perpetuate it, even if it is unintentional. To advance equity, we must consistently and consciously embed an equity lens into our processes and work. As a result, equity must be centered in our budgeting process and creation.

THE ROADMAP TO CHANGE

The goal is for departments to move to the right along the continuum, from a having a “Closed” budgeting process toward a “Transformational” one. Historically and currently, many budget processes, including ours, have been closed.



For examples of how aspects of the budgeting process can change from a closed process to transformational, see Appendix A: Budget Process Change Rubric.¹

BEST PRACTICES FOR EQUITY IN BUDGETING

Apply an intersectional, racial equity lens: Racial inequities are not random, natural, or inevitable. It is essential to use a racial equity lens when changing programs, plans, and policies that may perpetuate inequities, and when developing new programs, plans, and policies. “An equity lens” simply refers to the process conducted, and the questions asked, to help us consider and account for the impact of the decisions we make, especially the impact on structurally excluded communities. By using an intersectional, racial equity lens, we will gain awareness on how budgetary decisions may unfairly burden or benefit different communities, particularly communities of color. This also means that we consider how budgetary decisions may unfairly benefit communities at the intersection of race (e.g., women of color; LGBTQIA+ people of color; represented workers of color; etc.). The EBP is an equity lens that will help departments reflect on issues of equity through a process of answering specific, targeted questions.

Be data driven: What data is driving your department’s budget decisions? What does this data tell us about how communities of color are faring, and how will we measure progress in these communities? If you are making decisions that may affect specific King County communities, use the [Equity Index](#) to help inform your decisions. If you are making decisions that affect Port employees, refer to the [Equity Assessment](#) and [Women of Color Assessment](#) to guide you. Additionally, consider your WMBE and Diversity in Contracting goals. What resources do you need to meet those goals? How can you reflect that commitment in your budget?

¹ Sourced from City of Seattle’s Equitable Budgeting Rubric and Instructions.

Be accountable: Every department has an important role in reducing inequities; from fairness in hiring and promotions, providing equitable services for communities throughout our region, facilitating community participation and engagement, or creating greater opportunities in contracting. Additionally, as per the Equity Policy Directive, every department is required to set annual equity goals. Your budget is a statement of your values and priorities. Through it, make a departmental commitment to advance equity within our organization and in our region, and connect it to your department's equity goals.

Strengthen equitable community engagement efforts: To achieve meaningful and equitable results, departments need to work in partnership with the communities who are impacted by their work. These communities can be internal (i.e., Port staff) or external. It is essential to budget time and resources to partner with, or at the very least, incorporate the voice of, those most impacted by your department's work.

EQUITY IN BUDGETING INSTRUCTIONS

At the Division Level

Every Division will assess their department's budget for expenses that qualify as **equity spending** according to the criteria outlined below. This information will be submitted and tracked through Adaptive Insights, the Port's budget system, and the information will be used to help us understand how our budgets are aligning with our equity values and where we are spending money to advance equity.

Step 1: Equity Spending Determination Process

Part 1: For a budget item to qualify as equity spending, it must meet at least one of the three criteria below. If a budget item meets at least one of these criteria, then proceed to Step 2. This step is simply a filter to determine if an item qualifies as equity spending. You do not need to record which definition a budget item fulfills.

Note: Per the Equity Policy Directive, Equity Spending only focuses on tracking operating expenses.

If a budget item does not meet one of the criteria, then it does not qualify as equity spending, and you can continue to the next budget item.

A budget item is classified as equity spending if it:

- 1. Invests directly in structurally excluded communities, either through grants, contracts, programs, sponsorships, or dedicated facilities.*
- 2. Invests in businesses and individuals outside of the Port to help us realize our internal and external equity priorities.*
- 3. Invests in Port employees whose essential work functions were designed to primarily focus on advancing equity work.*

Part 2: If the budget item meets one of the above three equity spending criteria above, then sort the item into the most applicable category below. If the item could fit into multiple categories, please either select the category that it was assigned in a previous year or consult with OEDI. Please record the corresponding category in Adaptive Insights.

- A. Advancing Diversity – a budget item that increases diversity (race, gender, income, etc.) internally and/or externally.*
- B. Supplier Diversity – a budget item that builds the capacity of WMBEs or DBEs, grows the pool of WMBEs or DBEs, and/or strengthen the Port's ability to contract with WMBEs or DBEs.*

- C. Removing Systemic Barriers – a budget item used to address and change policies, programs, and systems that create disproportionate access to opportunities, information, and services.*
- D. Engagement – a budget item used to engage BIPOC communities and/or structurally excluded communities.*
- E. Community Investments – a budget item that invests in BIPOC communities and/or structurally excluded communities.*
- F. Environmental Justice – a budget item that addresses and/or improves environmental issues that disproportionately affect BIPOC and/or structurally excluded communities.*

Step 2: Answer the following questions, and use this [Word document](#), if helpful. For the file to function properly, open it in the Word Application. Your answers to these questions will be included your Division’s final budget presentation.

- 1. Did you have difficulty spending your budgeted equity dollars in 2024? And if so, why?*
- 2. In your 2025 budget, how did your Division choose to prioritize equity programs with the available budget?*
- 3. Additionally, is your Division implementing programs in an equitable way or plans to make programming more equitable, even if it's not directly associated with your budget or a budget request? If so, please explain.*
- 4. How did you engage with staff, internal customers, and/or community during the 2025 budget process?*
- 5. What new items have you added related to Equity, Diversity, and Inclusion in your 2025 budget (new requests and baseline budget)?*

At the Department Level

In addition to tracking budget items at the Division level that qualify as equity spending, **all Departments must answer the following questions by August 9th, 2024 using Microsoft PowerApps**. Below in italics are the questions you will answer in Microsoft PowerApps [here](#).

Your answers should be thorough and show clear evidence that these questions (and your answers to them) influenced the creation of your budget. Departments’ answers to these questions will be used to inform Division-level budget presentations. The Equity in Budgeting committee will provide access to the data submitted by their respective departments to identified Division-level staff.

Your department has been actively working with your Change Team Member(s) to set department-specific equity goals for the last two years. In combination with your equity goals and help from your Change Team Member(s), please respond to the following using this [form](#):

- 1. Select your Division.*
- 2. Which Department(s) are you answering for? Please provide a single department ORG number or list multiple department ORG numbers, separated by a comma. If your draft department Equity Goals differ by department under a shared director, consider submitting responses by ORG.*
- 3. Office of Equity, Diversity, and Inclusion (OEDI) is offering a comprehensive suite of training and learning opportunities for Port employees. Does your department need additional or specialized EDI training that OEDI is not currently offering? If so, please [contact OEDI](#) about including the proposed costs into OEDI’s budget.*
- 4. How will your proposed budget align with your department’s draft annual equity goals?*
- 5. Has the external training, education, and professional development for all team members been discussed fairly and taken into consideration in your preliminary proposed budget?*
- 6. How will you engage with your department’s staff, other Port staff or internal customers, and/or external communities or partners during the budget process?*

For examples of department responses, please see Appendix B: Department Response Examples.

LANGUAGE ACCESS BUDGETING INSTRUCTIONS

In April 2023, the Port Commission adopted Order 2023-05 to advance language access. The Order directs the Port to develop a language access policy and plan to ensure the inclusion of non or limited English speakers, including those who are hard of hearing or deaf, in the use of Port services and facilities; and the port-wide implementation of a plan directing divisions with public services to offer language assistance including translation and/or interpretation. The Order makes language access a permanent, ongoing commitment by the Port of Seattle in every department and every division.

Eighteen teams have been identified as highest usage departments, and they are the first teams developing language access plans. If you are a part of the following 18 teams please submit you plan using the same [Microsoft PowerApps Submission Form](#) from the section above: *AV 911 Dispatch, AV Capital Program Management, AV Commercial Management, AV Customer Experience, AV Facilities and Infrastructure, AV Ground Transportation, AV Security, Boating Operations and Security, Central Procurement Office, Cruise Operations, Diversity in Contracting, Environment and Sustainability, External Relations, Fire Department, Marine Maintenance, Police Department, Port Construction Services, and Public Records Request.* These 18 teams will:

- Complete a language access plan for 2025;
- Identify the resources/costs necessary to implement their language access plan in 2025; and,
- Meet with your supervisor and Finance and Budget representative to ensure they are aware of the expenses related to language access for 2025.

Language access is a mandate for the entire organization, but we have committed to a tiered process to implement the work in all departments over the next two years. If you are not one of the 18 departments listed above, you are not mandated to submit anything for 2025 unless you have already identified language access needs that you would like to include in your budget for 2025. In drafting your 2025 budget, please consider the following questions.

- Does your department have any plans to reach Limited English Proficiency communities?
- Have you been able to assess the cost of these efforts?
- Have they been included in your past budgets?
- Do you need support from OEDI to cost estimate the proposed plans?

APPENDIX A: BUDGET PROCESS CHANGE RUBRIC ²

Focus Area	Closed Process	Transactional	Racially Inclusive	Structural Change	Transformational
Staff Engagement	Department budget process is controlled by leadership and the finance team. The process is not transparent or open to other staff members.	Department leadership generally engages only management staff in the budget process, and only for specific items. Department leadership requests employee participation but either did not implement employee feedback or unclear if/how input was used.	Department leadership seeks and uses feedback from non-management staff.	Department leadership or Finance Team provides trainings for staff on understanding the budget process and incorporates time for staff to consult on the budget as a paid part of their job responsibilities.	Department workplan includes building up EDI skills among managers, budgeters, and other staff so that anti-racist analysis is ongoing and a natural foundation of any budget change proposal.
Change Team Engagement	Department leadership completed budget analysis on their own without engaging Change Team members.	Department leadership and Finance Team met with Change Team to talk about this year’s budget changes but either did not incorporate the Change Team’s input or unclear if/how input was used.	Change Team provides input on racial equity or social justice-focused programs but is not involved in other department-wide decisions.	Department leadership and Finance Team met with Change Team multiple times to discuss budget recommendations that were used for the budget. Change Team heavily influence budget decisions.	A cross-functional team with department leadership, Finance Team, and Change Team members work together to develop a multiple-year workplan for equitable budgeting.
Community Engagement	Community engagement may consist of one-way communication, such as: <ul style="list-style-type: none"> • Blog posts • Media releases • Email communication <p>Community feedback is not considered when making budget decisions.</p>	Community engagement may consist of more accessible one-way communication, such as: <ul style="list-style-type: none"> • Translated materials • Surveys <p>Community feedback is collected, but rarely used to make changes to the budget.</p>	Engagement includes two-way communication, such as: <ul style="list-style-type: none"> • Focus groups • Interviews • Forums • Advisory boards • Commissions <p>Community feedback has been used to inform strategic plans or other programming which inform budget decisions.</p>	Engagement includes two-way communication, such as: <ul style="list-style-type: none"> • Interactive and reciprocal • Feedback loops built into every part of decision-making • Workshops • Forums <p>Budget planning is informed by current community needs and conditions, and not just past community engagement efforts.</p> <p>Community is part of department’s implementation and monitoring processes for budget.</p>	Community engagement practices are determined by communities of those most harmed by racism or other forms of oppression. It incorporates and embodies elements of relational culture. <p>Department supports community engagement by providing technical assistance and other resources for community members.</p> <p>Department engages in two-way, long-term community engagement to inform budget decisions.</p>

² Sourced from City of Seattle’s Equitable Budgeting Rubric and Instructions

APPENDIX B: DEPARTMENT RESPONSE EXAMPLES

AV Customer Service

- 1. Office of Equity, Diversity, and Inclusion (OEDI) is offering a comprehensive suite of training and learning opportunities for Port employees. Does your department need additional or specialized EDI training that OEDI is not currently offering? If so, please contact OEDI about including the proposed costs into OEDI's budget.**
No - the customer service staff fully participates in OEDI offerings.
- 2. How does your proposed budget align with your department's draft annual equity goals?**
 - Supports programs to serve diverse customers with a wide range of communication needs (non-English speakers, low vision, ASL, translation via Language Line, in-person assistance and updating content on the Port's website)*
 - Advances the Port's accessibility objectives with improvements such as portable, variable height information kiosks (easier for people using a wheelchair to access)*
 - Ensures staff participates in activities to deepen understanding around diverse cultures*
- 3. Has the external training, education, and professional development for all team members been discussed fairly and taken into consideration in your proposed budget?**
Yes
- 4. How did you engage with your department's staff, other Port staff or internal customers, and/or external communities or partners during the budget process?**
The Airport Accessibility Committee has been involved with providing guidance for programs and amenities intended for customers with accessibility challenges. All department leaders were involved in developing the budget and updates during the summer about 2024 budget requests were shared with the full department.

Marine Maintenance

- 1. Office of Equity, Diversity, and Inclusion (OEDI) is offering a comprehensive suite of training and learning opportunities for Port employees. Does your department need additional or specialized EDI training that OEDI is not currently offering? If so, please contact OEDI about including the proposed costs into OEDI's budget.**
My team would like to establish a Reverse Mentorship Program. This will be open opportunity for Managers to learn from our work force. Each session will be 30-40 minutes. Change Team seek out topics from our work force. These sessions will be held virtually and in-person.
- 2. How does your proposed budget align with your department's draft annual equity goals?**
Access and Training for Represented Employees. I will continue to ensure staff and represented employees have equal access to training that historically has been overlooked. Ensure each trade has an equitable opportunity to develop personally and professionally.

- 3. Has the external training, education, and professional development for all team members been discussed fairly and taken into consideration in your proposed budget?**

Yes. Additionally, we have placed several opportunities for Staff and Represented Employees to attend the University of Washington Diversity, Equity and Inclusion Certificate Program. Additionally, we have also provided Women in Fleet Management Program. Lastly, we have also provided an opportunity for a member of our staff to participate in the Black Fleet Network.

- 4. How did you engage with your department's staff, other Port staff or internal customers, and/or external communities or partners during the budget process?**

In addition to internal organization conversations, we did conduct a SWOT Analysis and received additional feedback during our 2024 Business Planning Exercise.

ICT

- 1. Office of Equity, Diversity, and Inclusion (OEDI) is offering a comprehensive suite of training and learning opportunities for Port employees. Does your department need additional or specialized EDI training that OEDI is not currently offering? If so, please contact OEDI about including the proposed costs into OEDI's budget.**

In addition to OEDI training, ICT has 6 individuals on the 2023-2024 change team with a goal to train all ICT workgroups in how to get the most out of equity moments. We do not see a need at this time for additional training.

- 2. How does your proposed budget align with your department's draft annual equity goals?**

Our draft annual equity goals include supporting a stretch WMBE goal, supporting employee efforts on the change team and other EDI activities, EDI required and elective training for all employees, and exploring AI capabilities to recognize EDI opportunities in Port documentation. Our annual budget supports all of these activities as well as a small new request for AI storage.

- 3. Has the external training, education, and professional development for all team members been discussed fairly and taken into consideration in your proposed budget?**

Yes, our training budget includes not only traditional training opportunities, but also online classes geared toward technology. This is available to any ICT employees that are interested.

- 4. How did you engage with your department's staff, other Port staff or internal customers, and/or external communities or partners during the budget process?**

Several ICT staff, responsible for contracts in their specific areas, were involved in our bottom-up approach to building the ICT budget. All workgroups were solicited for new budget requests and the draft budget was reviewed by ICT leaders, available to any staff, and discussed in detail with the ICT Change Team members.

APPENDIX C: TERMINOLOGY

Equity in Budgeting Playbook: is a tool designed to integrate explicit considerations of racial equity into decisions, including policies, practices, programs, and ultimately, Departmental budgets. Using this tool will help you develop strategies and actions that reduce inequities, with a particular focus on racial inequities, and improve success for everyone.

Anti-Racism: the work of actively opposing racism by advocating for changes in political, economic, and social life. Anti-racism tends to be an individualized approach and set up in opposition to individual racist behaviors and impacts.

Communities of Color: refers broadly to group of people who hold racial identities that are not White. It can also be used to refer to a geographically distinct area where the population of color, expressed as a percentage of the total population in that area, is higher than the population of color in the surrounding areas. Communities of color can also be referred to as Black, Indigenous, and people of color (BIPOC).

Diversity in Contracting: In January 2018, the Port of Seattle Commission passed the Diversity in Contracting Policy Directive ([Resolution 3737](#)) with the purpose of increasing the participation of women and minority business enterprises (WMBE) in the Port's contracting for public works, consulting services, supplies, material, equipment, and other services. This directive works to identify affirmative efforts to afford WMBE enterprises the opportunity to meaningfully participate in Port of Seattle contracts.

Equality: means the same amount of power, opportunities, and resources are distributed to everyone with the assumption that everyone starts in the same place and has the same needs.

Equity: means the fair treatment, access, opportunity, and advancement for all people while striving to identify and eliminate barriers that have prevented the full participation of historically oppressed communities. Improving equity involves increasing justice and fairness with the procedures and processes of institutions or systems and a fair, intentional distribution of resources. It is important to note that equity is about addressing patterns of disparities among groups of people, not necessarily the experiences of single individuals.

Equity Index: is a tool created by the Port of Seattle that displays a visual representation and ranking of environmental pollutants and social inequities for each census block group in King County. The equity index is made up of 21 indicators within 4 main categories, including: economic opportunity, livability, accessibility, and environmental. The rankings in the index are relative to each other across King County. If an area has a high ranking, it is high in comparison to the rest of King County. When looking at King County as a whole, those are the average ranking across the county.

Equity Lens: a critical thinking approach to undoing institutional and structural racism, which evaluates burdens, benefits, and outcomes to under-served communities.

Intersectionality: means the interconnected nature of social categorizations such as race, class, and gender as they apply to a given individual or group, regarded as creating overlapping and interdependent systems of discrimination or disadvantage. The term was originally coined in 1989 by Kimberlé Crenshaw.

Low-income Communities: refers to census tracts with a poverty rate of at least 20 percent or a median family income 80 percent or less than the area it is benchmarked against. Low-income communities are considered structurally excluded communities, and the Port's Equity Index is a useful resource in identifying these communities.

Racial Equity Lens/Framework: means an analytical tool, or series of questions, that helps a team or group understand the impacts of their decisions as it relates to racial equity, implicit and explicit bias, and individual, institutional, and structural racism.

Structurally Excluded Communities: means people that historically and currently do not have equitable resources, access to infrastructure, healthy environments, housing choice, etc. Due to historical inequitable policies and practices, disparities may be recognized in both access to services and outcomes.

Women or Minority-Owned Business (WMBE): means a business that is at least 51 percent owned and controlled by women and/or minority (including, but not limited to African Americans, Native Americans, Asians, and Latino) group members.

A note about WMBE/DBE versus Equity Spending – The Port tracks WMBE/DBE spending through our Diversity and Contracting Department, which measures the amount of money that we contract out to WMBEs and DBEs and the number of WMBEs and DBEs that we contract with. In tracking Equity Spending, please do not include any WMBE/DBE contract spending that is separately reported by Diversity in Contracting so that we are not double counting our work.