

Municipal Bond Racial and Social Equity Scorecard

Scorecard Questions

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November 2023

The questions listed below are the full set of questions in the Municipal Bond Racial and Social Equity Scorecard. We recommend that tool users review these questions before accessing the scorecard so they can gather any documents that could help them prepare responses. When you are ready, you can access the online scorecard at <https://www.urban.org/projects/municipal-bond-racial-and-social-equity-scorecard>. For detailed instructions, see the Municipal Bond Social Equity Scorecard User Guide, available at <https://www.urban.org/projects/municipal-bond-racial-and-social-equity-scorecard-user-guide-and-methodology>.

Users will not be asked all the questions below. For example, in section 5, users are asked to indicate the types of projects being funded by their bond issuance; they will then only be given questions that correspond to those project types. For some questions, responding in a certain way will prompt users to answer another sub question. As such, the question numbers on your final scorecard may not match the numbering here. If a question is only asked in certain instances, we indicate this with indentation and bolded language at the beginning of the question (e.g., “**If ‘Yes’**”).

Section 1: Issuer and Bond Basics

1. Issuance name:

2. Issuer name:

3. What organization is completing this form (if different from the issuer listed above)?

4. Please describe the stage that this bond issuance is in. For example, is it in a preissuance stage, in which some details have not been finalized? Or has the bond been issued already?

5. What type of government/jurisdiction is issuing the bond? (pick one)

- State
- Tribal nation
- County
- City or town
- Special district
- Public authority (including state bond banks or state revolving funds)
- Municipal corporation
- School district
- Foundation
- Other

6. Was the funding for this project approved by a public vote?

- Yes
- No

7. Are you issuing the bonds as a conduit issuer on behalf of another jurisdiction(s) or entity/entities?

- Yes
- No

If "Yes": What are the entities?

8. How will the deal be sold?

- Private placement
- Public offering (negotiated sale)
- Public offering (competitive sale)
- Other

Please provide links to any appropriate and public sale documents (e.g., preliminary official statement, notice of sale, private placement memorandum), if they have been finalized and published by counsel by the time you complete this form.

9. If you have information about the bond structure, please list each series of bonds in your bond issuance.

10. How will you use the proceeds of the issuance? List and provide a short description for all the project(s) that will be (or are expected to be) funded with the proceeds from this bond, including if you have any project(s) that will be funded using the proceeds from the bond premium (if one is generated) or investment earnings.

11. Will the proceeds of this bond be used to fund projects related to public safety or judicial system facilities?

- Yes
- No

If “Yes”: You will be forced to exit the scorecard. This version of the scorecard is not equipped to score the racial and social equity of public safety or judicial facilities.

12. Does your plan for the funded project(s) center racial equity? If you are following an alternative approach that centers equality, social justice, justice, or other social factors, indicate that below.

- Yes
- No

If “Yes”: Please explain what you are doing and the results you expect to see from your efforts.

Section 2. Racial Equity Baseline Conditions, Policies, and Practices

1. Does the issuer or jurisdiction have an operational definition of racial equity? If your jurisdiction has not adopted a definition of racial equity but follows an alternative definition focused on equity, equality, social justice, justice, or other social outcomes, please answer “yes” and provide that definition.

- Yes

- No

If “Yes”: What is the definition?

2. Does your jurisdiction have a policy, vision, statement, or practices focused on racial equity that guides your operations? If your jurisdiction follows an alternative approach focused on equity, equality, social justice, justice, or other social outcomes, please answer “yes” and describe your approach.

- Yes
- No

If “Yes”: Describe the policy, vision, statement, or practices.

If “Yes”: Describe how your jurisdiction measures success and outcomes, and how it assesses the results of the policy, vision, or practices described above.

If “Yes”: Describe whether the policy, vision, statement, or practices described above are resulting in changes in conditions for communities and residents, including populations that have historically experienced discrimination or populations that face the greatest barriers to accessing economic opportunities.

3. What are the racial demographic characteristics of the population in your jurisdiction? Enter the percentage of the jurisdiction’s population that each racial group makes up.

- White:
- Black or African American:
- American Indian or Alaska Native:
- Asian:
- Native Hawaiian or Other Pacific Islander:
- Other:

4. What are the current ethnic demographic characteristics of the population in your jurisdiction? Enter the percentage of the jurisdiction’s population that each ethnic group makes up.

- Hispanic/Latine:
- Non-Hispanic/Latine:

5. Is the strategy for the bond issuance designed to further and advance racial equity, or, alternatively, equity, equality, social justice, and/or justice?

- Yes
- No

If “Yes”: Describe how the strategy for the bond issuance is expected to advance racial equity, or, alternatively, equity, equality, social justice, and/or justice and how it will result in changes in the community. In many cases, changes to outcomes, impact, or risk are the result of multiple systems in a jurisdiction, and it often takes time to see shifts across a multi-year time horizon. In your answer, you may comment on the various systems in your jurisdiction, and any relevant contextual factors.

6. Are there any jurisdictional rules governing contracting, hiring, or procurement decisions that consider racial equity or have the goal of furthering racial equity? (e.g., set-asides for minority or women-owned small businesses, hiring requirements across different groups)

- Yes
- No

If “Yes”: Please describe.

7. Based on your understanding of the racial and social equity priorities and needs in the jurisdiction for which the bond is issued, rank the following seven priorities for community residents. To do this, click and drag the options presented in order of 1 to 7, with 1 being the highest priority and 7 being the lowest priority. The way you rank these priorities will be used to score how this specific issuance will help your jurisdiction or entity reach these goals.

- Accessible, high-quality jobs
- Community wealth building
- Affordable and accessible housing
- Environment and open spaces
- Health, social services, and cultural amenities
- Transportation and transit
- Schools and education

8. Do you expect that the strategy for the bond issuance will further any of the following racial equity purposes? *(check all that apply)*

- Access
- Inclusion
- Well-being
- Assets

Please explain how the strategy for the bond issuance will further these racial equity purposes.

9. Recognizing that there are other systems for measuring the social benefits of projects, do you expect that the strategy for the bond issuance will further outcomes aligned with any of the United Nations Sustainable Development Goals? *(check all that apply)*

- SDG 1: Poverty
- SDG 2: Hunger
- SDG 3: Health and well-being
- SDG 4: Education
- SDG 5: Gender
- SDG 6: Water and sanitation
- SDG 7: Clean energy
- SDG 8: Decent work
- SDG 9: Industry innovation and infrastructure
- SDG 10: Equity and equality
- SDG 11: Sustainability
- SDG 12: Responsible consumption and production
- SDG 13: Climate
- SDG 14: Water
- SDG 15: Land
- SDG 16: Peace and justice

10. The questions below present several outcome domains that are used to measure *population level* conditions and disparities. Please select all the domains that you feel could potentially change in the jurisdiction if the issuance is successful in advancing the racial equity, or, alternatively, equity, equality, social justice, and/or justice strategy described in this section. (Select all that apply.) Your response may be used in the postissuance phase to track progress toward issuance goals.

- Poverty
- Employment
- Income or wages
- Education
- Housing tenure, stability, or affordability
- Health access and outcomes
- Public safety
- Other (specify)
- None

For those outcome domains selected: Please provide additional context on what specific metric(s) are anticipated to change within this outcome domain based on the strategy for the issuance.

For those outcome domains selected: Do you anticipate differential benefits by race/ethnicity that will improve racial equity?

- Yes
- No

If “Yes”: Please explain.

Section 3. Bond Series Details, Security Analysis, and Revenue Analysis

1. What is the principal amount of the bond (Par)?
2. What is the tax status for the bond? (*check all that apply*):

- Federally taxable
- Federally tax exempt
- Subject to the federal Alternative Minimum Tax (AMT)

3. If known, please enter as much information as you have about the maturity schedule or target duration of the structure of the scale of this bond. (If information differs by series, you can note that). You may include any preliminary monthly debt service projections, and/or details about the target duration (e.g., the first and final year of the maturity schedule). If this information appears in the preliminary official statement, official statement, or offering memorandum, please refer to the page on which it appears.

4. Is any part of the bond designated, or is it expected to be? *(check all that apply)*

- Green
- Social
- Sustainable
- Sustainability-linked
- Other
- None

5. If the bond has been rated, which rating agencies have rated this bond? *(check all that apply)*

- S&P, provide rating:
- Moody's, provide rating:
- Fitch, provide rating:
- Kroll, provide rating:

6. Does the bond carry any credit enhancement?

- Yes
- No

If "Yes": Please describe the form of credit enhancement below. (e.g., bond insurance, state guarantee, state intercept)

7. How is the bond secured? *(select one)*

- General obligation bond
- Revenue bond
- Other

8. How will this bond be repaid? Describe all sources of revenue.

9. Why were these revenue sources chosen?

If “General obligation bond”: In the authorization for the bond, have you identified a dedicated revenue source that will serve as the primary source to pay the bonds back?

- » Yes
- » No

If “Yes”: Please describe.

10. Please report all of the sources of revenues raised by your jurisdiction or government entity, in the most recent fiscal year you have information on, and state the amount and percent of each revenue source.

Revenue source	Amount (in dollars)	Percent of revenues
Property taxes		
General sales taxes		
Specific sales/sin taxes (e.g., cigarettes, alcohol, tobacco, marijuana, sugar-sweetened beverages)		
Other specific sales taxes including tourism taxes (e.g., restaurants, hotels, car rentals)		
Income taxes		
Other business taxes		
User fees and charges not otherwise specified (e.g., utility, motor vehicle)		
Fines, fees, forfeitures—criminal justice		
Fees and charges—education (higher and K-12)		
Other revenues		
Direct federal grants		
State or other local grants		

11. Is your jurisdiction or government entity engaging in any racial equity–focused efforts to reform or change your existing revenue structure or practices? (This could be part of efforts outlined in section 2 or additional or separate efforts.)

- Yes
- No

If “Yes”: Please describe those efforts or reforms.

12. If “General obligation bond,” or if the issuing jurisdiction is a state, county, or city or town: Has your jurisdiction analyzed or considered the impact of its revenue structure across residents with different incomes?

- Yes
- No

If “Yes”: Please describe.

13. If “General obligation bond,” or if the issuing jurisdiction is a state, county, or city or town: Are any revenue sources disproportionately burdensome for lower income populations?

- Yes
- No
- I don’t know

If “Yes”: Please describe.

14. If “General obligation bond,” or if the issuing jurisdiction is a state, county, or city or town: Has your jurisdiction analyzed or considered the impact of its revenue structure across residents with different racial or ethnic backgrounds?

- Yes
- No

If “Yes”: Please describe.

15. If “General obligation bond,” or if the issuing jurisdiction is a state, county, or city or town: Are any revenue sources disproportionately burdensome for racial or ethnic groups which have been historically marginalized?

- Yes
- No

If “Yes”: Please describe.

16. If “General obligation bond,” or if the issuing jurisdiction is a state, county, or city or town: Have any steps been taken to mitigate the impact of existing taxes, fines, or fees on low-income residents or residents who are people of color or part of other historically marginalized groups? (e.g., the ability to pay measures or rebates based on characteristics)

- Yes
- No

If “Yes”: Please describe the steps being taken and the results you expect to see from your efforts.

17. If “General obligation bond,” or if the issuing jurisdiction is a state, county, or city or town: Does the way the bond is secured—or other aspects of the plan of finance of this bond—reflect racial equity or other values or social considerations?

- Yes
- No

If “Yes”: Please explain how your approach reflects these values and the results you expect to see from your efforts.

18. For all other respondents: Is the dedicated revenue source that secures this bond being assessed and collected in a dedicated geographic area or from a dedicated population?

- Yes
- No

If “Yes”: Please explain the geographic area or population.

19. For all other respondents: Have you considered the population’s ability to pay toward the collection of any dedicated revenue sources that secure this bond?

- Yes
- No

If “Yes”: Please explain.

20. **For all other respondents:** Have you considered whether the revenue sources that secure this bond fairly distribute the costs across similarly situated individuals/businesses?

- Yes
- No

If “Yes”: Please describe.

21. **For all other respondents:** Have you considered whether the revenue sources that secure this bond fairly distribute costs across individuals/businesses at different income levels, geographies, or demographics?

- Yes
- No

If “Yes”: Please describe.

22. **For all other respondents:** Are the burdens of any taxes/fees that are used as revenue proportional to the benefits of the funded project(s)?

- Yes
- No

If “Yes”: Please explain.

23. **For all other respondents:** Does the way the bond is secured, or other aspects of the plan of finance of this bond, reflect racial equity or other values or social considerations?

- Yes
- No

If “Yes”: Please describe what you are doing and the results you expect to see from your efforts.

Section 4. Community Engagement Related to the Use of Proceeds

1. What share of the project(s) funded under the bond will undergo a community engagement process? This may include activities such as meeting with local residents or public officials, consulting community benefits agreements, or other activities.

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

If “0 percent”: Please explain why these project(s) will not undergo a community engagement process.

2. Are there any requirements that your jurisdiction has to meet regarding community engagement for project(s) of these types?

- Yes
- No

If “Yes”: Please describe where these requirements come from and the nature of the requirements.

3. What organization(s) has or will carry out community engagement? *(check all that apply)*

- The issuer
- Another organization(s)

What is the name of the organization(s) responsible for carrying out the community engagement? This could be the issuer or another organization.

4. For what share of the funded project(s) has the issuer or community-engagement partner consulted (or will consult before work commences) recent community plans for the area(s) where the project(s) are located or that are affected by the project(s)?

- 0 percent
- 1 to 25 percent

- 26 to 50 percent
- 51 to 100 percent

If not “0 percent”: List the name(s) and year(s) of the community plan(s) consulted or to be consulted.

5. For what share of the funded project(s) did the issuer or community engagement partner engage (or will engage before work commences) local elected officials or public agencies?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

If not “0 percent”: List the names of the local elected officials or public agencies and describe how they were or will be engaged.

6. For what share of the funded project(s) has the issuer or community engagement partner engaged (or will engage before work commences) residents and community members in the area(s) where the project(s) are located or that are affected by it?

- Yes
- No

If “Yes”: Has the issuer or community engagement partner already taken or will take affirmative steps to engage members of the community who belong to the following groups: *(check all that apply)*

- » Those who have historically experienced discrimination
- » Those who face the greatest barriers to accessing economic opportunities
- » Those who have been disproportionately exposed to environmental harms
- » Those who have been left out of past community engagement activities

If “Yes”: Please describe who was engaged or will be engaged and how they were or will be engaged in the project’s development.

If “Yes”: Did the issuer or community engagement partner take any of the following proactive steps to engage residents and community members? *(check all that apply)*

- » Held meetings at different times of the day and week
- » Held meetings in different locations
- » Provided child care at meetings
- » Engaged with partners that represent different groups
- » Provided materials in different languages
- » Other (please specify)

If “Yes”: Did the issuer or community engagement partner track participation among residents and community members who were engaged?

- » Yes
- » No

If “Yes”: Please describe participation in terms of number and composition of residents and community members.

If “Yes”: For what share of the funded project(s) has the issuer incorporated insights from community members in project design, or will they?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

If not “0 percent”: Please provide concrete examples of how the issuer has or will incorporate insights from community members in project design.

7. For what share of the funded project(s) are there other community interests or inputs that govern the work, such as a community benefits agreement, or a project-specific community advisory board?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

If not “0 percent”: Please describe.

If not “0 percent”: What is the racial composition of any governance structures put in place to govern the work (e.g. a community advisory board), and does it reflect the racial makeup of the surrounding community?

8. For what share of the funded project(s) are there any community-negotiated benefits, goals, or outcomes specifically designed to address racial equity outcomes?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

If not “0 percent”: Please describe.

9. The questions in section 4 of the scorecard cannot be skipped because they are scored. Are you able to answer all questions in this section accurately, to the best of your knowledge, and with confidence that a score should be based on them? Select your response below.

Please note that if you respond no to this question but still complete and submit the rest of the scorecard, you will receive a scorecard output that contains a list of all the responses you have provided, including the answer to this question, but you will not receive a score for your issuance.

- Yes
- No

Section 5. Use of Proceeds and Project Metrics Analysis

1. How would you describe the purpose or type of project(s) that are funded with the bond proceeds?
(check all that apply)

- Airports, ports and railroads
- Baby bonds
- Communication networks
- Demolition
- Education (K–12 and post-secondary schools)

- Health care facilities
- Housing
- Government buildings not otherwise specified (town halls, city clerk buildings, collector offices, etc.)
- Libraries, daycare centers, community centers, or other social infrastructure
- Parks, open lands, or other conservation
- Power and energy
- Public transit
- Roads and bridges
- Stadiums
- Waste management
- Water, wastewater/sewer, and stormwater
- Refunding
- Other

If “Refunding”: What project types are being funded by the refunded bonds? *(check all that apply)*

Note: For refunding bonds, the scoring works best if there is information available regarding the use of the proceeds of the bonds being refunded, including the details of the projects and community engagement that was undertaken. To the extent that this information is not known or knowable, this scorecard will be less effective in evaluating the bond, and the refunding may be better evaluated in how it allows the jurisdiction to more broadly realize racial equity goals.

- » Airports, ports, and railroads
- » Baby bonds
- » Communication networks
- » Demolition
- » Education (K-12 and post-secondary schools)
- » Health care facilities
- » Housing
- » Government buildings not otherwise specified (town halls, city clerk buildings, collector offices, etc.)

- » Libraries, daycare centers, community centers, or other social infrastructure
- » Parks, open lands, or other conservation
- » Power and energy
- » Public transit
- » Roads and bridges
- » Stadiums
- » Waste management
- » Water, wastewater/sewer, and stormwater
- » Refunding
- » Other

The next set of questions are about jobs related to the funded project(s).

2. How many new permanent, full-time jobs do you estimate the funded project(s) will create?

- 0
- 1-19
- 20-99
- 100 or more

3. How many short-term, full-time jobs do you estimate the funded project(s) will create?

- 0-9
- 10-49
- 50 or more

4. **If more than 0 jobs produced:** What share of these jobs do you anticipate will be available to low-income residents or residents who are people of color or part of other historically marginalized groups?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

5. **If more than 0 jobs produced:** What share of long-term and short-term jobs do you estimate will offer a living wage?

- 100 percent
- 50–99 percent
- 49 percent or less

6. **If more than 0 jobs produced:** Does the issuer or the organization that will carry out or operate the funded project(s) have a history of providing jobs for populations facing employment barriers on previous projects?

- Yes
- No

7. **If more than 0 jobs produced:** What share of jobs do you estimate will be subject to local hiring preferences or a locally sourced worker target for the jurisdiction or municipality where the funded project(s) are located?

- Less than 15 percent
- Between 16 percent and 30 percent
- 31 percent or more

8. **If more than 0 jobs produced:** Do you expect hiring guidelines for the funded project(s) to include practices that reduce obstacles for populations facing employment barriers, such as antidiscrimination protections beyond those required by federal and state law?

- Yes
- No

If “Yes”: Please describe the hiring guidelines or policy.

9. **If more than 0 jobs produced:** Will the job opportunities created by the funded project(s) offer career ladders or pathways for mobility for entry level and lower-wage employees, such as apprenticeships or on-the-job training opportunities? (*check all that apply*)

- On-the-job training opportunities in excess of two weeks’ paid time over the course of the year
- Apprenticeships

- Other career ladders or pathways for mobility

10. **If more than 0 jobs produced:** Will the lowest-wage permanent job supported by the funded project(s) include paid time off?

- Yes
- No

11. **If more than 0 jobs produced:** Will the lowest-wage permanent job supported by the funded project(s) include paid family leave?

- Yes
- No

12. **If more than 0 jobs produced:** Will the lowest-wage permanent job supported by the funded project(s) include company-sponsored health care?

- Yes
- No

13. **If more than 0 jobs produced:** Will the lowest-wage permanent job supported by the funded project(s) include company-sponsored retirement options?

- Yes
- No

14. Before we go to the next section, we wanted to give you an opportunity to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around accessible, high-quality jobs.

The next set of questions are about community wealth-building and procurement opportunities related to funded project(s).

15. Do you expect the funded project(s) will have local minority business enterprise contracting and procurement set-asides, targets, goals, or standards?

- Yes, for construction
- Yes, for operation

- No

If “Yes, for construction”: What share of the construction sourcing and procurement for the funded project(s) will qualify under minority business enterprise contracting?

- » 1 to 9 percent
- » 10 to 19 percent
- » 20 to 29 percent
- » 30 percent or more

If “Yes, for operation”: What share of the operation of the funded project(s) will qualify under minority business enterprise contracting?

- » 1 to 9 percent
- » 10 to 19 percent
- » 20 to 29 percent
- » 30 percent or more

16. Do you expect the funded project(s) will have any contracting or sourcing from small businesses?

- Yes
- No

If “Yes”: What share of the funded project(s)’ contracting or sourcing will come from small businesses?

- » 1 to 9 percent
- » 10 to 19 percent
- » 20 to 29 percent 30
- » 30 percent or more

17. Will the funded project(s) involve a minority-owned equity developer in the project development?

- Yes
- No

If “Yes”: What share of the funded project(s) will be controlled by minority-owned equity developers?

- » 1 to 9 percent

- » 10 to 19 percent
- » 20 to 29 percent 30
- » 30 percent or more

18. Will the funded project(s) help people build wealth by offering financial assistance or financial resources (e.g. mortgages, community banks, down payments, small business loans, higher education, or baby bonds)?

- Yes
- No

If “Yes”: What share of the financial assistance do you anticipate will be available to low-income residents or residents who are people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

19. Will the construction of these projects displace local residents or businesses?

- Yes
- No

20. Before we go to the next section, we wanted to give you an opportunity to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around community wealth-building and procurement.

The next set of questions are about affordable and accessible housing related to funded project(s).

21. Will the funded project(s) require the demolition of any existing housing, whether occupied or vacant?

- Yes
- No

If “Yes”: Is the housing occupied?

- » Yes, fully or partially occupied
- » No, vacant

If “Yes”: Are the funded project(s) a part of a city or neighborhood effort to address vacant, abandoned, and disinvested housing?

- » Yes
- » No

If “Yes, fully or partially occupied,” and project type is “housing”: Will the funded project(s) replace the demolished units with an equal or greater number of units at the same level of affordability?

- » Yes
- » No

If “Yes, fully or partially occupied”: Roughly how many occupied units will the funded project(s) demolish?

If “No, vacant”: Roughly how many vacant units will the funded project(s) demolish?

If “Yes, fully or partially occupied”: Will all residents displaced from demolished units be responsibly relocated?

- » Yes
- » No

If “Yes”: Briefly describe plans for responsible relocation.

22. If more than 0 jobs produced: Will the funded project(s) offer employer-assisted housing (EAH) benefits to employees?

- Yes
- No

23. If project type is not “Housing”: Will the funded project(s) contribute to a local or regional affordable housing development fund or a nonprofit affordable housing development organization at a meaningful level and above any legally required contributions (e.g., through state or local taxes or impact fees)?

- Yes

- No

24. **If project type is “Housing”:** Will the funded project(s) produce, rehabilitate, or preserve rental housing or owner-occupied housing or both? *(check all that apply)*

- Owner-occupied
- Rental

25. **If “Owner-occupied”:** Will What share of the owner-occupied units do you anticipate will be available to low-income residents or residents who are people of color or part of other historically marginalized groups?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

26. **If “Owner-occupied”:** Will any of the owner-occupied units be affordable to households with income at or below 100 percent of the area median income?

- Yes
- No

27. **If “Owner-occupied”:** Will any of the owner-occupied units be affordable to households with income at or below 80 percent of the area median income?

- Yes
- No

28. **If “Owner-occupied”:** Will the issuer or developer plan and establish partnerships with community-based organizations to market units to low-income residents or residents who are people of color or part of other historically marginalized groups?

- Yes
- No

29. **If “Owner-occupied”:** Will the issuer or developer make homebuyer assistance or counseling programs available to potential low-income neighborhood residents?

- Yes
- No

30. **If “Owner-occupied”:** Will any of the produced, rehabilitated, or preserved owner-occupied units have long-term or permanent affordability restrictions?

- Yes
- No

If “Yes”: Briefly describe the terms of the affordability restrictions, including income targets, affordability period and share of units covered.

31. **If “Owner-occupied”:** Will 50 percent or more of the developed owner-occupied units be priced at or above 150 percent of the current median home value in the neighborhood?

- Yes
- No

32. **If “Owner-occupied”:** Will at least 5 percent of the owner-occupied units constructed, rehabilitated, or preserved, and any common use areas, be accessible to people with mobility impairments, using the standards for accessibility included in the Uniform Federal Accessibility Standards or a standard that is equivalent or stricter?

- Yes
- No

33. **If “Rental”:** What share of rental units do you anticipate will be available to low-income residents or residents who are people of color or part of other historically marginalized groups?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

34. **If “Rental”:** What type of area will the rental units that will be produced, rehabilitated, or preserved be in?

- A high-cost area or a rapidly appreciating area that is facing market pressures or demographic changes
- An area with persistently high poverty rates
- A neighborhood that is not experiencing rapid appreciation or high levels of poverty

If “A high-cost area or a rapidly appreciating area that is facing market pressures” or “A neighborhood that is not experiencing rapid appreciation or high levels of poverty”: What share of the rental units that will be produced or preserved do you estimate will be affordable to residents with incomes at or below 80 percent of the area median income?

- » 50 percent or more
- » 11–49 percent
- » 1–10 percent
- » 0 percent

If not “0 percent”: Will any of the units be affordable to residents with incomes at or below 50 percent of the area median income?

- Yes
- No

If “An area with persistently high poverty rates”: What share of the rental units that will be produced or preserved do you estimate will be affordable to residents with incomes at or below 100 percent of the area median income (AMI)?

- » 50 percent or more
- » 11–49 percent
- » 1–10 percent
- » 0 percent

If not “0 percent”: Does the issuer or developer have a plan and establish partnerships with community-based organizations to market units to low-income residents or residents who are people of color or part of other historically marginalized groups?

- Yes
- No

35. **If “Rental”:** Will the issuer or developer commit to renting units to voucher holders if they qualify, and to not discriminating based on source of income?

- Yes
- No

36. **If “Rental”:** Will the funded project(s) include permanent supportive rental housing to address the needs of people who are homeless or otherwise unstably housed, experience multiple barriers to housing, or are unable to maintain housing stability without supportive services?

- Yes
- No

37. **If “Rental”:** What share of the rental units do you estimate will include long-term or permanent affordability restrictions?

- 15 percent or more
- 1–14 percent
- None

If not “None”: Briefly describe the terms of the affordability restrictions, including income targets and affordability period.

38. **If “Rental”:** 50 percent or more of the rental units that are developed be priced at or above 150 percent of current median rents in the neighborhood?

- Yes
- No

39. **If “Rental”:** Will common-use areas and at least 5 percent of the rental units constructed, rehabilitated, or preserved be accessible to people with mobility impairments, using the standards for accessibility included in the Uniform Federal Accessibility Standards or a standard that is equivalent or stricter?

- Yes
- No

40. Before we go to the next section, we strongly encourage you to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around affordable and accessible housing.

The next set of questions are about the environment and open spaces related to funded project(s).

41. **If project type is “Water, wastewater/sewer, and stormwater”:** Will the funded project(s) improve access to safe, clean, and affordable drinking water for residents in the jurisdiction?

- Yes
- No

If “Yes”: What share of the improved water access will benefit low-income residents or residents who are people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

42. **If project type is “Power and energy”:** Will the funded project(s) improve access to reliable or affordable energy for residents in the jurisdiction?

- Yes
- No

If “Yes”: What share of the improved access or affordability of energy will benefit low-income residents or residents who are people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

43. **If project type is “Water, wastewater/sewer, and stormwater,” “Waste management,” or “Power and energy”:** Will the funded project(s) primarily benefit the community they are physically located in?

- Yes
- No

44. Will any portion of the funded project(s) be built to green or energy-efficient national or local standards?

- Yes
- No

If “Yes”: List the applicable project certifications and/or standards.

45. Will the funded project(s) produce a product or service that preserves, conserves, or restores the natural environment or addresses climate change?

- Yes
- No

46. Will the funded project(s) directly improve environmental conditions in the jurisdiction or municipality (e.g., through site remediation or waste reduction)?

- Yes
- No

47. Are there ways in which the operation or construction of the funded project(s) will negatively impact the environment or health of the community where it is physically located (e.g., through increased air or noise pollution)?

- Yes
- No

If “Yes”: Is there a plan for remediation of these harms?

- » Yes, there is a plan for full remediation
- » Yes, there is a plan for partial remediation
- » No

If “Yes”: Please describe any plans for remediation.

48. Will any portion of the funded project(s) reduce air pollution?

- Yes
- No

49. Will the funded project(s) involve the disposition of public land for development?

- Yes
- No

If “Yes”: Are there any specific inclusionary practice requirements attached to the disposition process that will help advance racial equity?

- » Yes
- » No

If “Yes”: Please describe.

50. Will the funded project(s) expand/improve or reduce the amount of publicly accessible park or green space in the community?

- Expand/improve
- Neither reduce nor expand
- Reduce

51. Will any portion of the funded project(s) be located in a site prone to disasters, including any of the following disasters: wildfire, seismic activity, flood, hurricane, or drought?

- Yes
- No

If “Yes”: Will steps be taken to meaningfully mitigate risks and increase resiliency?

- » Yes, there is a plan for full remediation
- » Yes, there is a plan for partial remediation
- » No

If “Yes”: Briefly describe what improvements or features will be included to increase resiliency for future disasters.

52. Before we go to the next section, we wanted to give you an opportunity to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around the environment and open spaces.

The next set of questions are about health, social services, and cultural amenities related to funded project(s).

53. Will the funded project(s) provide or expand a space, facility, infrastructure, or service that meets a basic need or provide a necessary social good that was previously missing or insufficient in the jurisdiction (I.e. health or community service facility or infrastructure improvements that will benefit health)?

- Yes
- No

If “Yes”: Briefly describe the basic need met or social good provided.

54. Will the funded project(s) create a cultural amenity that is currently lacking in the jurisdiction or municipality?

- Yes
- No

If “Yes”: Briefly describe the cultural amenity provided.

55. What share of any new health, social service, or cultural facilities or services will serve a low-income neighborhood or a neighborhood that is primarily composed of people of color or other historically marginalized groups?

- 0 percent
- 1 to 25 percent
- 26 to 50 percent
- 51 to 100 percent

56. Will the funded project(s) displace or reduce existing health services, social services, or cultural amenities?

- Yes
- No

If “Yes”: Briefly describe the health services, social services, or cultural amenities being displaced or reduced by this project.

57. Before we go to the next section, we wanted to give you an opportunity to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around health, social services, and cultural amenities.

The following questions are about transportation and transit related to funded project(s).

58. Will the funded project(s) include or require significant additions to or changes of roadways or pedestrian right of ways in the neighborhood?

- Yes
- No

If “Yes” and project type is “Roads and bridges” or “Public transit”: Will the funded project(s) create or expand options for car-free transit, such as public transit, bike lanes, or sidewalk access?

- » Yes
- » No

If “Yes”: Will the funded project(s) support safe street and transportation access for all users through a Complete Streets design?

- » Yes
- » No

If “Yes”: Briefly describe how the funded project(s) will support safe street and transportation access options.

If “Yes”: What share of the residents accessing these roadways do you anticipate will be low-income residents or residents who are people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent

- » 26 to 50 percent
- » 51 to 100 percent

59. If project type is “Airports, ports and railroads,” “Education,” “Health care facilities,” “Housing,” “Government buildings not otherwise specified,” “Libraries, daycare centers, community centers or other social infrastructure” “Parks, open lands, or other conservation,” or “Stadiums”: Are there affordable and accessible transportation options near the services or sites being developed?

- Yes
- No

If “Yes”: Briefly describe the affordable transportation options.

What share of the residents accessing these sites or services do you anticipate will be low-income residents or residents who are people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

60. If project type is “Roads and bridges” or “Public transit”: Will the funded project(s) increase access to job centers or other resources and amenities for the surrounding community?

- Yes
- No

If “Yes”: What share of users of this transportation project do you anticipate will be low-income residents or residents who are people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

61. If project type is “Airports, ports and railroads,” “Education,” “Health care facilities,” “Housing,” “Government buildings not otherwise specified,” “Libraries, daycare centers, community centers or other social infrastructure” “Parks, open lands, or other conservation,” or “Stadiums”: Will the funded project(s) include any parking?

- Yes
- No

If “Yes”: Will the project(s) provide electric vehicle charging stations?

- » Yes
- » No

62. Will the funded project(s) be part of an existing transit-oriented development plan?

- Yes
- No

If “Yes”: Describe whether you have considered any possible negative effects of this development plan, such as an increase of gentrification or the pricing out or displacement of residents or businesses, especially as it relates to low-income residents or residents who are people of color or belong to other historically marginalized groups.

63. **If project type is “Roads and bridges”:** Is the funded road or bridge in, or will it be built through, a low-income neighborhood or a neighborhood that is primarily composed of people of color or other historically marginalized groups?

- Yes
- No

64. **If project type is “Airports, ports and railroads”:** Is the funded airport, port, or railroad located in a low-income neighborhood or a neighborhood that is primarily composed of people of color or other historically marginalized groups?

- Yes
- No

65. **If project type is “Roads and bridges”:** Will the funded project(s) increase traffic in the area surrounding it? For example, will this be a heavily trafficked road or freight route?

- Yes
- No

If “Yes”: Is there a plan to mitigate the negative effects of increased traffic on the surrounding community?

- » Yes
- » No

If “Yes”: Please describe any plans.

66. If project type is “Public transit”: Will the funded project(s) reduce vehicle traffic?

- Yes
- No

67. Before we go to the next section, we wanted to give you an opportunity to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around transportation and transit.

The following questions are about schools and educational benefits created or modified by funded project(s).

68. Will the funded project(s) improve educational conditions or create an educational benefit for the community?

- Yes
- No

If “Yes”: Please describe the benefits.

If “Yes”: What share of these benefits will be accessed by low-income residents or residents who are primarily people of color or part of other historically marginalized groups?

- » 0 percent
- » 1 to 25 percent
- » 26 to 50 percent
- » 51 to 100 percent

69. Will the funded project(s) increase community access to broadband?

- Yes

- No

70. **If project type is “Education”:** What level of education will these facilities serve? *(check all that apply)*

- K-12
- Community college
- Four-year university
- Other

71. **If project type is “Education”:** Will the funded project(s) renovate existing school facilities or build new school facilities?

- Renovate
- Build new
- Both renovate and build new
- Provide resources to be spent at the discretion of the district (e.g. resources can help renovate or build schools but also be used for equipment or computers)

72. **If project type is “Education”:** What percentage of the student body in the jurisdiction will benefit from this project?

- Up to 25 percent
- 25 to 50 percent
- 51 to 99 percent
- All

If not “All”: Does the jurisdiction have a prioritization process in place for how it decides where to invest in school facilities?

- » Yes
- » No

If “Yes”: What does that prioritization process consider? *(check all that apply)*

- Age of the facility
- Safety of the facility

- Student population served
- Location or neighborhood
- Improving conditions for historically underserved or at risk populations
- Other

If “No”: Were the sites chosen using any of the following criteria? *(check all that apply)*

- Growth in student populations
- Conditions of existing schools
- Improving conditions for historically underserved or at risk populations
- Other

73. If project type is “Education”: Will this school be accessible to students who live in the community surrounding it?

- Yes, only to people in the community
- Yes, community preference but also open to others
- No, equally open to all

74. If project type is “Education”: Does the jurisdiction have a census of the conditions of its school facilities?

- Yes
- No

75. If project type is “Education”: Are the funded project(s) going to improve or offer new facilities that were previously unavailable, in disrepair, or inadequate? *(check all that apply)*

- Windows in instructional areas
- Heating
- Air conditioning
- High-speed Wi-Fi/internet
- Air flow and quality
- Bathrooms
- Other

76. Before we go to the next section, we wanted to give you an opportunity to describe any aspects of the funded project(s) that may advance or impede racial equity goals or other social considerations around schools and education.

77. The questions in section 5 of the scorecard cannot be skipped because they are scored. Are you able to answer all questions in this section accurately, to the best of your knowledge, and with confidence that a score should be based on them? Select your response below.

Please note that if you respond no to this question but still complete and submit the rest of the scorecard, you will receive a scorecard output that contains a list of all the responses you have provided, including the answer to this question, but you will not receive a score for your issuance.

- Yes
- No

Acknowledgments

The Municipal Bond Racial and Social Equity Scorecard was developed as part of the Municipal Bond Markets and Racial Equity Framework project of the Public Finance Initiative, funded by the Robert Wood Johnson Foundation. We are grateful to them and to all our funders, who make it possible for Urban to advance its mission. The views expressed are those of the authors and should not be attributed to the Urban Institute, PFI, their trustees, or their funders. Funders do not determine research findings or the insights and recommendations of our experts. Further information on the Urban Institute’s funding principles is available at urban.org/fundingprinciples.

We’d also like to thank the [Capital for Communities Scorecard](#) team, including [Martha Fedorowicz](#), [Solomon Greene](#), [Brett Theodos](#), [Elizabeth Burton](#), and [Kathryn Reynolds](#), whose work was a critical foundation for the development of the Municipal Bond Racial and Social Equity Scorecard. A particular thanks to Solomon Greene, who played an instrumental role in the early conversations that launched the Municipal Bond Racial and Social Equity Scorecard.

For more information on this project, see <https://www.urban.org/projects/municipal-bond-racial-and-social-equity-scorecard>.



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