

# Metro | *Agenda*

Meeting: Council Retreat – Equity Inventory  
Date: Tuesday, June 5, 2012  
Time: 1 p.m. to 4 p.m.  
Place: Oregon Zoo, Sunset Room

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| I. Framing the issue                     | <b>Martha Bennett</b>                    |
| II. What will be covered in this retreat | <b>Martha Bennett</b>                    |
| III. Presentation                        | <b>Nuin-Tara Key</b>                     |
| IV. Staff recommendations                |  |
| V. Council discussion                    | <b>Facilitated by<br/>Martha Bennett</b> |
| VI. Summary and direction to staff       |  |

Materials following this page were distributed at the meeting.

# Metro | Agenda

Meeting: Council Retreat  
Date: Tuesday, June 5, 2012  
Time: 1 p.m. to 4 p.m.  
Place: Oregon Zoo  
Outcomes: Agree on expectation of equity as a regional outcome  
Agree on process to develop agency-wide strategy  
Agree on a timeline

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## I. Framing the issue

**Martha**

How did we get here? Council adopted equity as one of the six desired regional outcomes in 2010 and more recently asked Metro leadership and staff to help the Council figure out how to operationalize it.

## II. What we want out of this retreat

**Martha**

- Retreat objectives
- What we will be discussing
- What we will *not* be discussing

## III. Presentation

**Nuin-Tara Key**

- What did we learn from doing the Inventory?
  - Metro lacks a consistent strategy to address equity considerations
  - Agency-wide challenges in the absence of an overarching strategy
  - A phased approach will be needed to address inventory findings and build a strategy
- What others are doing and what we can learn from them

## IV. Staff recommendations

- Support proposed Phase 2: Define the focus and a process for an agency-wide strategy moving forward
- Identify institutional and structural challenges

## V. Council discussion

- Consideration of staff recommendations
- Guidance and agreement on next steps

## VI. Summary and direction to staff

# Metro Equity Inventory Report

In 2011, the Metro council recognized the limitations staff and regional partners face in the absence of a clear equity strategy and directed Metro staff to initiate the development of an organizing framework that consistently incorporates equity into all Metro decisions. Given the scale of effort needed to strategically move Metro's equity work forward, project staff has recommended a three-phase approach to developing a framework for Metro. The Equity Inventory Report is the first step in the process of developing an agency-wide equity framework.

In 2010 the Metro Council adopted Equity as a regionally desired outcome: "The benefits and burdens of growth and change should be distributed equitably across the region."

Over the past few years, Metro's involvement around equity issues has increased. Since 2008, equity has been identified as a regional outcome, leading to its adoption as one of the region's six desired outcomes. To further support these efforts, Metro Council recently identified the need to create an equity lens, or decision-support mechanism, to ensure that decisions are guided by a clear equity focus. Parallel to these efforts, Metro staff and partners have worked to build capacity to better address the regional inequities that stand in the way of long-term prosperity. However, efforts to operationalize equity as a regional outcome lack the strategic direction needed to ensure their success.

The equity inventory report provides a snapshot of how Metro *intentionally* incorporates equity considerations into agency activities. The inventory is intended to provide Metro staff and community stakeholders with information on how Metro currently considers equity. In addition, the inventory can serve as a platform for developing an intentional strategy to advance equity issues in the future.

To develop an equity framework Metro needs a strategy for how to move forward. This strategy needs to explicitly define the scale and scope of how the agency will advance equity. To be successful in this effort, any strategy that Metro considers needs to have community support that evolves through sustained and equal partnership.

## A Phased Approach

**The objective of this work is to outline an approach for how Metro can operationalize equity as a regional outcome.** The intended outcome is to ensure the development of an organizing framework that provides the structure and support needed to embed equity into the institutional culture of Metro. By embedding equity into the organization's culture, Metro staff and leadership will have the knowledge and tools to consistently incorporate equity into Metro activities. This will not only prevent duplication of effort, but also equip staff and leadership with the capacity and knowledge to address the concerns community partners and organizations have with regard to Metro's current practices.

In recognition of the effort required to achieve this long-term outcome, staff propose the development of a three-phase approach. The following is an overview of each proposed phase of the project.

### Phase 1 | Metro Equity Inventory Report

Before developing a framework Metro leadership and staff needed to have a better understanding of Metro's current practices around equity. By engaging both Metro staff and external stakeholders, the Equity Inventory Report provides a snapshot of how Metro currently incorporates equity considerations into agency activities. In an effort to inform Phase 2, the report captures a number of findings and recommendations that emerged through the year-long research phase.

### Phase 2 | Define a strategy

The Phase 2 engagement process should result in two outcomes: first, the region—including community partners and stakeholders—needs to articulate and focus the region's desired outcome around equity. Second, and again through an engagement process, Metro should articulate the agency's strategy for achieving this desired outcome.

### Phase 3 | Implement the strategy

Once an equity strategy is chosen, implementing this strategy will increasingly guarantee that Metro leadership and staff consistently consider equity at the beginning phase of program, policy and project development, ensuring equity considerations become actionable by staff and measurable during evaluation.

## Phase 1 Overview

In an effort to inform the process of developing an agency-wide equity strategy, the Equity Inventory captures 22 specific activities that intentionally incorporate equity considerations. The project team interviewed Metro employees currently engaged in projects and programs that strategically advance equity issues. Staff was asked to provide detailed information on how their department, program or project considers equity. It is important to note that this inventory is not an exhaustive account of all Metro activities. For the purposes of this report, project staff chose to include programs and projects that strategically and intentionally advance equity,

## Activities documented in the Equity Inventory Report

### Planning and Development

- *Regional Travel Options (RTO) Strategic Plan*
- *Active Transportation Demonstration Projects*
- *Regional Flexible Funding Allocation*
- *Vámanos!*
- *East Metro Connections Plan*
- *Southwest Corridor Plan*
- *Federally Funded Projects*
- *Opportunity Mapping*

### Sustainability Center

- *Resource Conservation and Recycling Division Strategic Action Plan*
- *Recycle at Work*
- *Toxics Reduction program*

### Parks and Environmental Services

- *Solid Waste Operations: Hazardous Waste Roundups*
- *Solid Waste Operations: MetroPaint staffing*
- *Community Enhancement grant program*

### Visitor Venues

- *First Opportunity Target Area*
- *Minority, women and emerging small business (MWESB) program*
- *Oregon Zoo*

### Research Center

- *Greater Portland Pulse*

### Agency-wide practices

- *Opt In*
- *Minority, women and emerging small business (MWESB) program*
- *Diversity Action Plan*

### Community Investment Initiative

highlighting the work that is currently underway. Further, the process of completing this inventory highlighted that various projects and programs are in different stages of readiness and capacity when it comes to incorporating equity.

## Findings

The findings are based on the themes and commonalities of efforts to advance equity at Metro as well as input gathered during interviews with outside stakeholders.

**Phase 1 confirmed that there is duplication of effort and a lack of strategic guidance to support intentional efforts to advance equity throughout Metro’s activities.** The inventory process also highlighted the inconsistency of approach as well as the lack of capacity to advance this issue throughout the agency. While some departments and divisions are farther along the spectrum of capacity and knowledge to incorporate equity, others struggle to understand the equity implications of their work.

## Barriers

Efforts to **build and maintain relationships** with underserved communities are inconsistent in part due to the following:

- Staff has **limited time** to seek out and build relationships with other professionals working on equity issues and time to accommodate these partnerships is not typically considered during project scoping.
- There is a **lack of flexibility** to create unique communication mechanisms with standard policies and/or procedures.
- Staff and leadership have not considered or adopted performance measures designed to hold them **accountable for implementation** of policies that advance equity.

## Limitations

Metro has **limited experience** around the issue of equity and has not invested in capacity and knowledge building for staff, leadership or partners to advance equity as part of Metro’s activities.

- Metro **does not have a definition for equity** that provides strategic direction to guide the agency’s work.
- A **lack of inter-agency coordination** leads to inefficiencies, uncoordinated outreach and engagement, and duplicative research and engagement efforts.

## Implementation considerations

Staff identified the need to have **guiding documents or policies** to consistently implement efforts to advance equity.

- Even when mandated, there is often **limited or no guidance on best practices** available for reference.
- To date, Metro has primarily focused on geographic and health equity, which do not ensure **transferability** to other equity issues.

## Role of leadership

The Metro Council and the Senior Leadership Team have supported the goal of overcoming regional inequity, however there is **no specific direction or allocated resources** to advance this work. In absence of Metro’s leadership, community organizations and regional partners are leading the work around equity.

## Recommendations

Overall, there is critical need for Metro to develop a strategy if the agency intends to advance regional equity as identified in the desired outcome. Taking this first step will require funding and staff capacity to move this work forward.

**Define the focus of a strategy to move forward.** Developing a strategy will increasingly guarantee that Metro leadership and staff consider equity at the beginning phase of program, policy and project development, ensuring equity considerations become actionable by staff and measurable during evaluation. While defining a strategy should NOT take place without meaningful external stakeholder partnerships and dialogue, the focus of the strategy needs to deliberately build capacity within the agency to advance other dimensions of equity.

**Identify institutional and structural challenges.** Time needs to be spent on identifying the existing institutional and structural barriers to advancing equity. This process should identify how these barriers might be addressed and needs to be completed through a formal and transparent process that is grounded by community partnerships.

**Recognize the need for internal and external strategies to do this work.** Metro's new Diversity Program Manager can serve a role in this work, however not all diversity and equity issues can be addressed with one staff position. While there is overlap between the internal and external efforts to advance equity and diversity, they require different types of actions and skills and should not be considered to be interchangeable. Similarly, more education on the difference between diversity and equity is needed throughout the agency.

**Given fiscal realities and constraints, identify how current resources can be allocated differently to address equity.** A central theme to Seattle's Race and Social Justice Initiative is the idea that "*we cannot pay our way to equity*". While additional resources, time and energy are needed to advance equity, applying more resources to existing processes will not achieve equitable outcomes—it may in fact exacerbate existing inequities.

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[www.oregonmetro.gov](http://www.oregonmetro.gov)

# Metro Equity Inventory Report

Section 1 | Findings & Recommendations

June 2012



## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

Stay in touch with news, stories and things to do.

**[www.oregonmetro.gov/connect](http://www.oregonmetro.gov/connect)**

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## ACKNOWLEDGEMENTS

This inventory was developed with direction from the Senior Leadership Team and input by staff and management throughout the agency. We would like to express our appreciation to the following individuals in this regard:

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## INTRODUCTION AND BACKGROUND

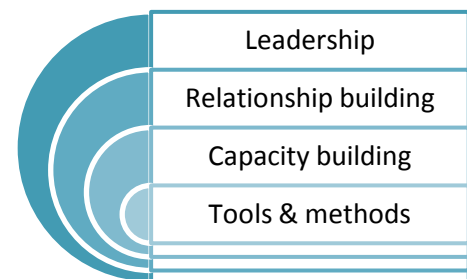
The equity inventory report provides a snapshot of how Metro intentionally incorporates equity considerations into agency activities. The inventory is intended to provide Metro staff and community stakeholders with information on how Metro currently considers equity. In addition, the inventory can serve as a platform for developing an intentional strategy to advance equity issues in the future. In order for any strategy that Metro considers to be successful there must be community support that develops through sustained and equal partnership. In an effort to inform the discussion of how to improve Metro’s organizational capacity to strategically advance equity, the report captures a number of limitations and barriers, as well as opportunities, that emerged through this research.

While these considerations are included in the inventory report and should inform agency-wide decisions on how to develop a cohesive and intentional strategy moving forward, the inventory is not intended to be a comprehensive audit; this report should be seen as a starting point, not an exhaustive evaluation. To that end, the findings and recommendations are intended to help guide Metro’s work around equity; they are *not* intended to take the place of the external engagement and coordination that is necessary to defining Metro’s path forward in operationalizing equity as a regional outcome. Rather, the recommendations are the result of an examination of the internal efforts Metro can take to advance the organization’s capacity around equity.

The inventory is the first phase of a proposed project focusing on how Metro should strategically advance equity within the context of the agency’s activities. Future work is dependent upon resources and staff availability. The long-term goal is to develop an agency-wide organizing framework that intentionally and consistently incorporates equity into all Metro activities. An agency framework would provide the structure and guidance for all Metro staff to be well equipped to work towards ending the legacy of inequity that exists within our communities. Building off the work of a growing number of public agencies in the region and throughout the country, the process of developing an equity framework would achieve the following objectives:

- Develop the leadership to sustain a long-term initiative to address structural inequities.
- Invest in sustained relationship building with traditionally underrepresented communities and organizations as well as partner organizations as a means to developing relevant, effective and equitable regional outcomes.
- Mobilize support for a shared vision of equity through staff training and capacity building.
- Develop the appropriate tools and methods needed to embed equity within the agency’s organizational culture.

Accomplishing these four objectives will take ongoing commitments of leadership, time and resources. This work can seem overwhelming and daunting given the multidimensional nature of the issue—especially when it is new and uncharted for Metro. The sense that equity is an intractable challenge is further compounded by a lack of internal capacity to address these issues. However, based on the work of other public



agencies, a key to successfully initiating this work is to be strategic and intentional; Metro cannot advance all dimensions of equity at one time and this work cannot be accomplished without defining a strategic focal point from which to start. Metro must develop a strategy moving forward and define the dimension of equity that will provide a strong and lasting approach to advancing equity. This work should not be isolated from Metro’s existing activities and should build on the agency’s strong foundation of regional collaboration and leadership.

In 2010, the Metro Council adopted the regions’ six desired outcomes which were endorsed by city and county elected officials. Ensuring that the “benefits and burdens of growth and change are distributed equitably” is one of those values. These outcomes have proven to serve as valuable direction to staff and Metro Council—especially around policymaking activities. The presence of an explicit equity outcome places the issue as a driver in regional policymaking.

Over the past few years Metro has become increasingly aware of the existence of historic and systemic inequity in the region due to a strong community-based movement as well as local and external public institutional efforts that are working to embed equity perspectives into regional policymaking. By building partnerships with these organizations and institutions Metro is working to develop the institutional knowledge needed to understand the equity implications of the agency’s programs and policies. This document demonstrates how Metro staff is finding ways to explore how to incorporate equity considerations into their work and Metro Council and the Senior Leadership team have provided support for this work, all of which provide a foundation for moving forward.

#### REGION’S 6 DESIRED OUTCOMES

##### **Vibrant communities**

People live, work and play in vibrant communities where their everyday needs are easily accessible.

##### **Economic prosperity**

Current and future residents benefit from the region's sustained economic competitiveness and prosperity.

##### **Safe and reliable transportation**

People have safe and reliable transportation choices that enhance their quality of life.

##### **Leadership on climate change**

The region is a leader in minimizing contributions to global warming.

##### **Clean air and water**

Current and future generations enjoy clean air, clean water and healthy ecosystems.

##### **Equity**

The benefits and burdens of growth and change are distributed equitably.

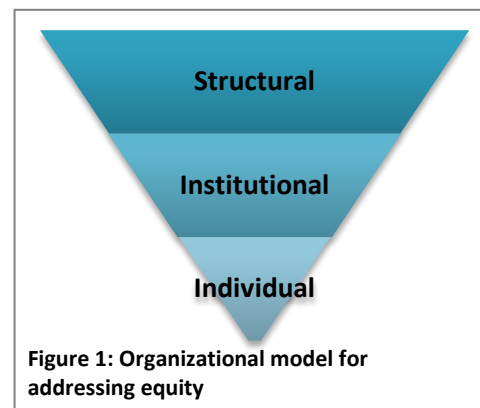
## IDENTIFYING THE CHALLENGE

While Metro's efforts continue to expand in the area of equity, this inventory was undertaken in recognition that there is a lack of coordination and knowledge about what is being done. Recognizing this as a missed opportunity, this report provides a summary of current efforts to strategically address equity, identifies opportunities for coordination and collaboration, and reveals areas for improvement.

Staff recognizes that Metro lacks a consistent process for incorporating equity into all of the agency's planning, policy and operational activities. Staff working on various projects are not consistently coordinating efforts, thus reducing overall efficiency and effectiveness in achieving one of the region's desired outcomes. For example, staff from various projects reach out to similar organizations working on equity issues, duplicating efforts and demonstrating a lack of coordination. Awareness about the need to coordinate is growing throughout the agency, and staff have begun sharing information; developing an understanding of the range of activities taking place at Metro will help with these coordination efforts.

The Metro Council and Senior Leadership Team have expressed interest in, and provided general support for, incorporating equity considerations throughout Metro's diverse portfolio of activities. To meaningfully advance equity considerations however, staff needs further direction and concise information on how to strategically institutionalize equity perspectives into Metro activities and regional decision making processes. In addition, staff need decision support tools to consistently inform staff efforts and decision-making.

To develop an equity framework Metro needs to define a strategy for how to move forward. This strategy needs to explicitly define the scale and scope of how the agency will advance equity. While there are inequities in all major indicators of success and wellness, there must be a focus to Metro's strategy. As mentioned earlier, Metro cannot advance all dimensions of equity at once and this work cannot be accomplished without defining a strategic focal point from which to start. Focusing on a single dimension of equity should not be seen as a prioritization but rather a strategy to an ultimate destination where all communities benefit from this work. While the strategy needs focus, it must however increase the ability of Metro to advance equity across multiple oppressions and inequities. For example, the City of Seattle made the decision to strategically address racism as the core dimension of their equity initiative. Central to this work is the understanding that their strategy will not advance all dimensions of equity at the same time, but will develop the skills needed to address other facets of equity. Through sustained effort, the City is building capacity to apply this work to other inequities.



### Strategy Example: The City of Seattle Race & Social Justice Initiative\*

The City of Seattle and the Seattle Office for Civil Rights challenge many forms of oppression, including racism, sexism, heterosexism, ableism and many others. The Race and Social Justice Initiative (RSJI) focuses on eliminating institutional racism and racial inequity. We are sometimes asked, “Why lead with race?” RSJI leads with race because of:

- The pervasive and deep disparities faced by people of color. We recognize that challenging institutional and structural racism is essential if we are to support the creation of a just and equitable society;
- The many years of community organizing that demanded the City to address racial inequity. To this end, we recognize the necessity of supporting all communities in challenging racism; and
- The necessity of focus. We recognize that efforts to eliminate racism are essential to achieving an equitable society, and that those efforts by themselves are insufficient. We “lead with race,” and are also working on institutionalized sexism, heterosexism, ableism and other oppressions.

DIMENSIONS OF RACISM	DESCRIPTION
<b>Structural</b>	The interplay of policies, practices and programs of differing institutions which leads to adverse outcomes and conditions for communities of color compared to white communities that occurs within the context of racialized historical and cultural conditions.
<b>Institutional</b>	Policies, practice, and procedures that work to the benefit of white people and the detriment of people of color, usually unintentionally or inadvertently
<b>Individual</b>	Pre-judgment, bias, stereotypes or generalizations about an individual or group based on race. The impacts of racism on individuals – white people and people of color (internalized privilege and oppression). Individual racism can result in illegal discrimination.

#### Why focus on institutional racism?

RSJI focuses on institutional racism in recognition that while individual racism deserves our attention, for long term change to take place, it is necessary to elevate the discussion to how eliminating institutional racism can help lead to racial equity. An institutional approach is necessary across the board and as the City deepens its ability to eliminate racial inequity, it will be better equipped to transform systems and institutions towards collective liberation for all.

#### What about people experiencing multiple oppressions?

All historically disadvantaged groups experience systemic inequity. Many people and communities live at the intersection of these identities, experiencing multiple inequities at once. By centering on race and using tools that can be applied across oppressions, we increase the ability of all of us to work for equity.

\* Excerpts from *Why Lead with Race? Challenging Institutional Racism to Create an Equitable Society for All*, The City of Seattle Race & Social Justice initiative. For more information see [www.seattle.gov/rsji/](http://www.seattle.gov/rsji/)

## PROJECT APPROACH

The Equity Inventory Report is the first step towards developing an agency-wide equity framework, which should provide the guidance and decision-support tools needed to deliberately advance equity.

### Phasing

This report is the first phase of a proposed project focusing on how Metro should approach developing an intentional strategy to advance equity. The long-term goal is to develop an organizing framework that will provide the structure and support to embed equity into the organizational culture of Metro. By embedding equity into the organization's culture, Metro staff and leadership will have the knowledge and tools to consistently incorporate equity into all Metro activities. Developing an equity framework will provide Metro staff and community stakeholders a standardized approach for how Metro, as a public agency, considers equity in its policies, programs and operational activities. This will not only prevent duplication of efforts it will also respond to a number of concerns community partners and organizations continue to raise in regards to Metro's current practices.

By engaging both Metro staff and external stakeholders, this project provides a forum to share information and discuss current data and methods used to measure the equity outcomes of Metro activities. In addition, the inventory can serve as a platform for partnering with community organizations, stakeholders and public partners to develop an intentional strategy to advance equity issues in the future.

The outcomes of Phase 1 are:

- Develop a common understanding of the equity related activities currently taking place within Metro and support a better understanding of how project managers can currently incorporate and measure the equity impacts of their projects;
- Highlight the current limitations and barriers Metro staff and leadership face when working to advance social equity;

The equity inventory report is the first step in a process to address equity within the context of Metro's role as a regional government and represents the first phase of a broader project approach.

The overarching deliverables of all three phases include:

**Phase 1:** Inventory Metro's current efforts to address equity, including high-level findings and recommendations.

**Proposed Phase 2:** Development of a community engagement plan to establish community-supported regional equity principles and an agency-specific strategy. This strategy should identify Metro's explicit approach to addressing equity.

**Proposed Phase 3:** Development of an agency-wide equity framework that institutionalizes an agency-wide equity strategy and provides the appropriate tools and mechanisms to embed equity throughout the agency culture

Project scoping for Phase 2 and 3 will follow successful completion of Phase 1. However, completion of Phases 2 and 3 is dependent upon resources and staff availability.

- Identify a preliminary set of recommendations on how Metro can develop a strategic plan and resources for advancing equity goals and implementing a regional equity framework throughout the agency;
- Provide clear and consistent information to Metro Council in order to define equity as a criterion for evaluating alternatives under the agency's priority initiatives.

## Cross-departmental inventory

In Phase 1, the project team interviewed Metro employees currently engaged in projects and programs that strategically advance equity issues. Staff was asked to provide detailed information on how their department, program or project considers equity. For the purposes of this report project staff chose to include programs and projects that strategically and intentionally advance equity, highlighting the work that is currently underway. The inventory does not capture all interviews and information collected during the inventory process. Further, the process of completing this inventory highlighted that various projects and programs are in different stages of readiness and capacity when it comes to integrating equity. However, staff has shown a high level of interest in identifying how to improve their current efforts and to better integrate equity into activities where it is not currently considered.

It is important to note that this inventory is not an exhaustive account of all Metro activities. Conducting an exhaustive audit of how all department, program or project activities affect equity outcomes was outside the scope and staff capacity of this project; therefore including all activities was too cumbersome given the limited resources available to project staff.

In addition to collecting information on internal equity focused efforts, project staff brought on an Oregon Fellowship intern in the summer of 2011.<sup>1</sup> This additional capacity provided the support needed to conduct a preliminary scan of local and external approaches to developing equity principles and/or frameworks. Information was collected through either in-person meetings or via phone interviews. This work provides valuable background and context for Metro as this work moves forward. The contacts and relationships made through these interviews introduced this work to external partners and provided an important first step as Metro engages in community dialogue on equity approaches.

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<sup>1</sup> The Center for Public Service/Executive Leadership institute (ELI) at the Mark O Hatfield School of Government at PSU hosts several highly competitive 10-week fellowship programs that are designed to bring national class talent to Oregon public enterprises. The Oregon Fellowship Program strives to provide internships to student of color currently enrolled in a Masters program.



## FINDINGS

This section summarizes the equity inventory findings and is organized into the following sections:

- Limitations
- Barriers
- Implementation approaches
- Role of leadership
- Opportunities moving forward

The findings are based on the themes and commonalities of efforts to advance equity at Metro as well as input gathered during interviews with outside stakeholders. These findings are intended to facilitate further discussions on how to best operationalize equity perspectives at Metro. The findings and recommendations presented in the inventory report are not endorsed by the staff interviewed over the course of the project and represent the authors' perspectives based on the information gathered through both internal and external interviews.

Phase 1 confirmed the concern that there is duplication of effort and a lack of strategic guidance to support intentional efforts to advance equity throughout Metro's activities. The inventory process also highlighted the inconsistency of approach as well as the lack of capacity to advance this issue throughout the agency. While some departments and divisions are farther along the spectrum of capacity and knowledge to incorporate equity, others struggle to understand the equity – and at times social – implications of their work. While these findings describe significant limitations to Metro's current ability to advance equity, Metro—when faced with other challenging and dynamic issues—has demonstrated the facility to overcome organizational challenges. Whether building relationships and partnerships with the business community, leading on climate change or establishing the space as regional convener and trusted partner with local jurisdictions, Metro has asserted the capacity to adapt and evolve. While Metro continues to improve in all of these areas, these efforts serve as a strong foundation upon which to build an equity strategy. Further, there is substantial momentum and support throughout the agency to improve around the issue of equity.

The findings presented below should be considered within the context of a few overarching observations. **First, given Metro's position along a spectrum of organizational readiness, it needs to be recognized that Metro should not attempt to advance all dimensions of equity at one time.** Advancing any number of social equity issues requires significant capacity building, knowledge and time. Therefore, it is recommended that Metro define an explicit strategy to move forward. While this strategy should be focused, it should also develop the skills needed to advance other dimensions of equity, or other *isms*. For example, if Metro were to define a racial equity strategy, this strategy should support the skills needed to also address gender equity. This has been a proven approach by other institutions in the region and beyond.

**Second, it is important to distinguish between equity outcomes and definitions and an actionable strategy.** Metro has adopted a regional equity outcome, which has guided a number of internal efforts to advance equity. However, the inventory process highlights the need to take the next step and define a strategy for how to achieve this outcome. Without strategic direction, efforts to advance equity will

remain uncoordinated and potentially divergent, which despite best intentions, will not ensure the realization of the existing regional equity outcome.

**The third consideration reflects the need to be realistic about the time and resources required to implement an equity strategy.** However, it is important to note that Metro cannot “pay its way to equity”. While financial resources are needed, solely increasing funding to existing efforts will not address the structural and institutional barriers to advancing equity. Identifying structural and institutional barriers takes deliberate effort to identify the systemic biases that are built into our institutions and society.

**Lastly, Metro leadership and staff should not expect to be immediate experts in this arena and should be transparent about the agency’s current capacity, knowledge and culture.** There are a number of organizations and agency partners who have taken a leadership role around equity issues – these agencies and partners provide a wealth of knowledge and experience that Metro can build on.

## Barriers

**Inconsistent efforts to build and maintain relationships with underserved communities |** While Metro has increased efforts to partner with organizations representing and working with underserved communities, these efforts have been inconsistent and intermittent by reaching out only to engage them on specific or discrete issues. Engagement has not been coordinated, consistent, or sustained. Metro has fallen short of developing long-lasting relationships, which makes it increasingly difficult for staff to effectively build new partnerships due to a lack of trust and familiarity with Metro. Not only does this lead to a lack of understanding of Metro’s role, but also results in a number of community organizations becoming frustrated with being excluded from broader decision-making processes. When community partners are engaged solely around discrete projects or activities and without direct input in the decision making process, there is a perception that their voice and perspective is not valued.

**Limited time to build partnerships |** Staff has limited time to seek out and build relationships with other professionals working on equity issues. Developing working relationships with partners doing this work is critical for staff to improve their understanding of how to incorporate equity considerations, identify existing resources to support this work, and to benefit from the lessons learned from the experience from others. Time to accommodate these activities is not typically considered during project scoping.

**Accountability |** While there seems to be strong interest by staff to better advance equity issues, there is not unanimity in the scope and scale of this work. Even when equity related processes are mandated, there are reports of staff reluctance to implement these requirements. For example, through the process of conducting this inventory it became clear there is not universal support or understanding of the MWESB program. This lack of understanding and support serves as a barrier to staff implementing an existing policy; it also highlights the need to hold staff and leadership accountable to implement existing policies.

**Lack of flexibility to create unique communication mechanisms with standard policies and/or procedures** | Constrained by capacity and resources, staff does not always utilize creative and innovative ways to reach out to underserved communities. Many staff have acknowledged that traditional outreach strategies do not work for underserved communities. However, creating new mechanisms will take staff time and resources that are generally not dedicated unless projects reprioritize existing work programs.

## Limitations

**Lack of definition** | The activities outlined in this inventory vary widely as to the extent to which they are guided by a definition; for the activities that utilize a definition, a variety of definitions are referenced. It is apparent that a common understanding of what Metro means by equity would provide invaluable guidance to Metro staff. A number of activities referenced the regional outcomes when questioned about the use of a definition and while this provides validation for efforts seeking to advance equity, it does not provide sufficient direction on how Metro is defining successful advancement of the regional equity outcome. Relying on regional equity as an outcome does not provide strategic guidance to staff on how to incorporate equity. Further, a lack of common discourse around equity limits staff and regional partners' ability to engage in constructive dialogue around the complex issues surrounding advancing equity. Metro, in its role as regional convener, is well positioned to establish partnerships with community and agency partners to support a common regional dialogue around equity.

**Lack of agency strategy** | Similar to the absence of a definition, the absence of a strategy keep provides the tools and mechanisms needed to incorporate equity is limiting Metro's ability to systematically advance equity. This has resulted in different projects incorporating equity in different ways, leading to inefficiencies and missed opportunities to incorporate equity into new projects and programs. It has also resulted in an inability to measure outcomes-based impacts of existing efforts.

**Internal efforts are inconsistent** | As outlined in Section 2 of the inventory, there are a number of projects intentionally incorporating equity considerations. However, staff working on these projects is not always aware of the range of activities taking place within the agency. A lack of coordination leads to inefficiencies of effort, with different staff sometimes contacting the same organizations multiple times or researching data or demographic information when another project may have already found relevant information. Additionally, in the absence of a consistent approach, the method of analyzing equity concerns varies across the agency. This makes it difficult for Metro as a whole to understand how the agency's work is impacting different communities.

**Incomplete data** | Developing and maintaining equity metrics are often cited as major limitations that prevent Metro staff from incorporating equity considerations. This stems from a lack of data, the politicized nature of some mainstream data sources and a limited understanding of what to measure and how to develop equity metrics. A useful framework for understanding the different dimensions of these data and measurement limitations is to categorize metrics into two broad categories; *transactional* and *transformational*. For example, demographic data, which are an example of transactional data, are cited as being inconsistent, out of date and unreliable at multiple scales, limiting

the level of analysis that can be performed. Additionally, demographic data are often available at different scales—for example some data are available at a census block level while other data are only available at a county level—limiting the level of analysis that can be performed. However, issues of scale are only part of the challenge; the majority of existing data sets do not adequately account for diverse populations and their issues, rendering invisible many communities of low income, immigrants and people of color. This is usually a result of lack of awareness on the part of technical practitioners. Most data collection efforts are not lead by communities but rather by outsiders who do not have an understanding of how best to engage with these communities. There are however, instances when issues surrounding disparities and inequities are intentionally hidden for political reasons. Further compounding the limitations of developing equity metrics is the general lack of attention paid to developing and evaluating transformational metrics that capture transformations in condition or perspective. While these transformational metrics are often difficult to quantify they are critical to analyzing outcomes-based equity impacts (Metro has made progress in this area over the last few years by partnering on the development of the Greater Portland Pulse).<sup>2</sup>

**Transactional** data track quantifiable markers that are generally more tangible (e.g. the number of members or participants, or the demographics of an area).

**Transformational** data demonstrate how people and organizations have changed or how societal and political views have shifted in response to collective efforts.

**Metro’s unique portfolio of activities** | Metro has a unique portfolio of activities—from operating venues to land use and transportation planning—which makes it challenging to find examples of other equity related initiatives that can be directly applied to Metro. However, a number of public agency efforts are applicable to aspects of Metro’s services and can inform efforts to incorporate equity throughout the agency. While it is important to seek out these examples, it is also important to recognize that work will need to be done to determine how Metro incorporates equity across all activities.

**Staff capacity** | Staff has a strong interest in understanding how to better incorporate equity into their work; however, there are inconsistent resources and leadership across the agency to do so. Effectively incorporating equity requires specific training, time and capacity development investments. A number of staff whose work is outlined in this inventory received direct support (and occasionally training) to do the work, however without an agency-wide commitment to incorporate equity, this work remains on a project by project basis, limiting the potential impact that Metro can make on advancing equity in this region.

<sup>2</sup> For more information see <http://portlandpulse.org/>

**Knowledge |** While the issue of equity is getting more attention, what it means and how it can be supported and measured is not as widely known throughout Metro. There are a number of reasons for this, but acknowledging that there is an information gap is critical to moving forward. Not only does staff need training to better understand what equity means and how Metro’s activities intersect with equity issue, staff also needs to understand the various ways in which equity can be incorporated into the agency’s daily activities.

Building a strong knowledge base around equity issues is analogous to the capacity development that was needed to become a leader in environmental sustainability; staff are well versed in communicating the benefits and value of their work in environmental sustainability terms but are often at a loss to express the value of their work in equity terms.

### Implementation considerations

**Role of guiding documents and policies |** In the absence of an agency-wide strategy to advance equity considerations two divisions within Metro (the Resource Conservation and Recycling (RCR) Division and the Regional Transportation Planning (RTP) Division) have taken a strategic approach to advancing equity within the context of division programs and projects. While these efforts went into effect relatively recently (both in 2010), they provide a promising practices for other divisions and the agency as a whole to explore. Program and project staff referenced division-specific guiding documents when asked to identify drivers for their efforts to advance equity.

The RCR division is currently in the process of developing new indicators and measures with which to gauge program implementation and progress. These are driven and directed by a strategic action plan initiated as the result of the council-adopted Regional Solid Waste Management Plan (RSWMP). The RCR division has identified the need for alternative measurement processes in place of, or in addition to, the traditional regional per capita generation and recovery rates.

RCR staff referenced the Division’s Strategic Action Plan (SAP), which articulates both a guiding principle and a goal specifically related to equity. By intentionally including equity in the framework of the SAP, the division is responsible for developing measures that will evaluate how each program and project within the division are working to meet the division’s goal. (The same process is being undertaken to measure the effectiveness of the division’s work against three additional goals. By including equity as a goal, equal to all other division goals, equity has become a central component to the division’s long-term programs). While staff may not have the training, tools or mechanisms in place to fully incorporate equity into all aspects of their work, the RCR division has established a vision for how their work will advance equity.

The RTP group has a similar, yet less formalized, outcomes-based approach to incorporating equity into regional transportation planning efforts. By including equity as a goal in one of the region’s central planning documents (the RTP), a number of other transportation planning efforts include equity as a desired outcome. A key difference between the approach utilized by these two divisions is that while the RCR provides a planning framework, the RTP group does not require that the performance of each

program be tied to each goal within the RTP, resulting in a project by project decision as to whether or not equity measures and outcomes-based evaluation criteria are developed.

**Not one size fits all |** Given the range of services provided at Metro, different projects and programs will need to approach equity using different tools and mechanisms. Therefore, while some level of standardization is needed to guide how Metro advances equity, flexibility is needed to ensure that staff can incorporate equity in ways that complement their work. Time will need to be allocated for staff to work directly with partners to determine how to incorporate equity in ways that support community specific needs and approaches. While staff has laid some groundwork, further exploration and refinement is needed to make incorporating equity an agency-wide practice. Also, considerably more resources (time and funding) need to be dedicated to building and maintaining partnerships.

**Metro's focus on geographic and health equity |** The concept of geographic equity is well understood by and familiar to Metro staff. Given that Metro's jurisdiction makes up twenty-five cities and three counties, ensuring that Metro controlled resources are distributed equitably across the region is a common practice. However, geographic equity is just one aspect of equity and as a strategy does not typically ensure the development of tools that can be applied across oppressions or other dimensions of equity. The other facet of equity that is more familiar to Metro is the dimension of health equity. Metro has received funding to incorporate health equity lenses into a number of planning related activities and health equity is a concept that is being supported by county health departments. Again, while using the health equity lens is very useful, it is but one aspect of equity. As Metro works to define a strategy moving forward, the issue of transferability will need to be considered.

**No clear guidance on implementation even when mandated |** Several projects and programs included in this inventory are mandated to incorporate equity or environmental justice considerations. However, there is often limited or no guidance on best practices available for reference. For example, the federal government—in an effort to address environmental justice issues—mandates several transportation planning and funding efforts. However, Metro receives limited direction or guidelines from the federal government in how to implement these guidelines. Given the complexities of these projects and issues staff is often faced with questions on how to effectively address these mandated requirements.

**Need to ensure legal compliance |** As Metro continues to incorporate equity considerations, it is important to work closely with Office of Metro Attorney to ensure the actions taken are within the legal guidelines of the agency.

## Role of leadership

**Community organizations have led the call for equity |** While the Senior Leadership team and Metro Council have expressed support for exploring how Metro should incorporate equity, it is feedback from leaders in underrepresented and communities of color that has caused this issue to be examined. These community organizations have vocalized that current policies and programs are not addressing the needs of their communities. Increasingly, data are available that show the growing disparities between different communities in the region, especially for low-income and minority communities. The leaders

from within these and other community groups are highlighting the connections between the needs of their communities and Metro.

**No active internal or organizational leaders |** Senior Leadership Team and the Metro Council verbally support the goal of overcoming regional inequity, however there is no direction or allocated resources to move this work beyond its current status (a stated regional outcome). Several divisions within the agency have long-range planning documents that include equity as a guiding principle and Metro Councilors have expressed a desire for Metro to evaluate policies and programs through an equity lens. However, Metro leadership has not taken an active role in ensuring that consistent and effective resources and staff capacity are provided to move this work forward. Metro's Senior Leadership Team has provided support for the completion of this inventory, but stronger internal support will be needed if this work is to progress to future phases.

**Advisory committees provide limited opportunity for consideration and discussion of equity |** Mandates around committee membership of several advisory committees at Metro limit the ability to recruit a more diverse and representative membership. This limits opportunities for community-based organizations to be in a decision-making position where equity considerations could be brought to the forefront. Several Metro committees that have some flexibility in membership have become more intentional about recruiting members from diverse communities, with an effort to recruit community members who are able to represent equity concerns. Metro has heard from many community leaders that more support is needed to ensure members of their communities effectively participate on policy committees. Metro recognized this concern in the 2011 HUD Sustainable Communities grant application. Metro's application included dedicating a portion of the HUD grant to fund a proposed program that would provide grant resources to community-based organizations. The intent of this program was to provide community-based organizations funds to support capacity building activities that would better enable meaningful participation in regional decision-making processes. While Metro did not receive the HUD Sustainable Communities grant, Metro should still consider how aspects of the capacity building proposal can move forward.

## Opportunities

**Staff motivation in absence of guidance and structure |** Conducting this inventory has revealed that many staff members are motivated and interested in learning how they can incorporate equity into their work. A number of staff members interviewed for this project began incorporating equity because they felt it was important and wanted to be responsive to community input, not because they were directed to do so by Metro leadership. Outside of this work group, a group of Metro employees are voluntarily meeting on a monthly basis to discuss issues around equity and how they might play a role in advancing the effort to incorporate equity both within their work and throughout the agency.

**Momentum is building despite limited resources |** As outlined in the following two sections, staff is pursuing opportunities to incorporate equity despite limited resources. A number of projects have received outside resources and grants, which have allowed them to supplement existing resources to conduct additional work around equity. Overall, staff is finding ways to incorporate equity even in times

of limited resources, which reinforces the need to recognize that with a minimal level of investment Metro can leverage this work and ensure that staff are coordinated in these efforts. Ultimately, however, Metro will not be able to implement systemic change without a deliberate decision to fund and support these equity efforts on an agency-wide basis.

**Current Metro activities provide direction to move forward |** The work captured in this inventory lays the groundwork for Metro to move forward on efforts to strategically advance equity throughout all agency activities. Several staff noted that the regional equity outcome provided general direction to justify their work on equity. While it is unclear how this outcome will be measured or implemented, by having it as a regional outcomes signals to staff that it must be addressed. The work of the Community Investment Initiative Equity Workgroup is advancing regional discussions with local partners and will provide Metro with an example of a policy tool that can be adapted to meet the agency's strategic direction on equity (once defined). Lastly, Metro's Diversity Action Plan represents a list of important internally focused actions that will increase Metro's ability to address the needs of a diverse staff as well as increase the skills and capacity of Metro staff to respond to the region's diverse communities.



## RECOMMENDATIONS

As evidence by the work outlined in this inventory, Metro staff have laid important groundwork for incorporating equity. However, to move this work forward, a number of actions need to take place. The following section provides a summary of the conclusions and recommendations to be considered in advancing this work at Metro. These recommendations result from conducting the inventory, and researching promising practices of other government entities, such as the City of Seattle, King County, WA, Multnomah County and the City of Portland. The recommendations below represent a range of actions that should be taken over a period of time. These actions will take considerable time and consistent effort to implement and figure 2 outlines a potential sequencing of activities. This sequencing should be taken as a suggested conceptual framework for how to approach developing and implementing a consistent agency-wide equity strategy. Before action is taken, further discussion and engagement is needed with both internal and external stakeholders, including Metro Council, Senior Leadership Team, Metro staff, and regional partners and community organizations.

An overarching finding coming from this work is that—despite the growing momentum within Metro to advance equity—there is critical need to invest in developing a strategy to define Metro’s role in advancing regional equity. It must be acknowledged that taking this first step will require funding and staff capacity, however establishing a strategy is essential if this work is to move forward.

Staff time and funding should initially focus on a few key areas:

**Define the focus of a strategy to move forward.** Developing a strategy will increasingly guarantee that Metro leadership and staff consider equity at the beginning phase of program, policy and project development, ensuring equity considerations become actionable by staff and measurable during the evaluation.

- While defining a strategy should NOT take place without meaningful external stakeholder partnerships and dialogue, the focus of the strategy needs to deliberately build capacity within the agency to advance other dimensions of equity.
- Based on the work of other public agencies that are leaders in this field, including regional partners, it is recommended that Metro’s strategy focus on advancing racial dimensions of equity, or institutional racism. However, before coming to a conclusion around this strategy, an engagement process needs to be developed to ensure that there is community support and commitment to the direction Metro takes.

**Identify institutional and structural challenges.** Time needs to be spent on identifying the existing institutional and structural barriers to advancing equity.

- This process should identify how these barriers might be addressed and needs to be completed through a formal and transparent process that is grounded by community partnerships.

**Recognize the need for internal and external strategies to do this work.** Metro’s new Diversity Program Manager can serve a leading role in this work, however not all diversity and equity issues can be addressed with one staff position.

- While there is overlap between the internal and external efforts to advance equity and diversity, they require different types of actions and skills and should not be considered to be interchangeable.
- Similarly, more education on the difference between diversity and equity is needed throughout the agency.

**Given fiscal realities and constraints, identify how current resources can be allocated differently.** A central theme to Seattle’s Race and Social Justice Initiative is the idea that *“we cannot pay our way to equity”*.

- While additional resources, time and energy are needed to advance equity, applying more resources to existing processes will not achieve equitable outcomes—it may in fact exacerbate existing inequities.

The following provides more detailed recommendations that serve as the basis for the abovementioned overarching recommendations.

**Build on current work |** As this inventory reveals, there are a number of efforts underway that advance a many various dimensions of equity. These efforts should serve as a foundation for future work. While Metro’s current efforts have resulted in a void of strategic direction and leadership, they should not be overlooked when defining the path forward. For example, the Community Investment Equity Workgroup is developing an equity lens that may be adaptable for Metro’s use. The groundwork laid as part of the HUD Sustainable Communities grant can help guide regional engagement and policy work, especially in light of the strengthened relationships that resulted from the grant submission process. Lastly, while the Diversity Action Plan does not specifically advance the issue of equity, certain strategies and actions outlined in the plan present opportunities to advance equity and leverage work that is being done throughout the agency. Additionally, the creation of the Diversity Program Manager position presents an opportunity to coordinate future efforts to advance equity within the current efforts to increase diversity and cultural competence at Metro.

**Invest in relationship building |** Ensure adequate public involvement resources are available to support building relationships with new partners. Project staff, beyond public involvement team members, is often the main source of contact for the public and community stakeholders and should be supported in that role. While Metro has taken steps towards building important relationships, more time and staff resources are needed to maintain existing, and build new, relationships. To this end, several steps should be taken:

- Based on external feedback, Metro should consider establishing one point of contact for equity related questions or concerns, a practice commonly employed by other jurisdictions. This person should be viewed as a leader within the agency; however this person cannot be solely responsible for developing these relationships. The objective should be to provide consistency, accountability and access to external groups.
- Involve Senior Leadership Team and Metro Councilors in outreach to community organizations representing equity interests, especially when reaching out to community leaders.
- Require project work scopes to include an equity scoping element or lens to ensure underrepresented groups are engaged in appropriate and meaningful ways.

**Conduct a formal equity audit |** A formal equity audit can provide the mechanism to intentionally examine how Metro’s existing policies, programs and activities perpetuate inequities. Metro should conduct the audit after establishing a strategy to better ensure that the right questions are asked during the process. The audit, while internally focused, should be completed in partnership with community-based organizations and groups in a transparent and collaborative manner. The audit should include conducting interviews with staff and agency leaders (including Council) as well as outside stakeholders and should result in agency-specific recommendations around the best path forward for advancing equity.

**Establish formal work teams |** To ensure that Metro fully incorporates equity into the fabric of the agency, a range of formal teams should be created.

- To ensure a common discourse around equity and to better ensure coordination across the region, Metro should develop and maintain a formal body or structure that is made up of institutions, public agencies and community based organizations. This partnership should serve to better align efforts to advance equity throughout the region and provide an opportunity for collaboration.
- Based on best practices from the City of Seattle, functional area staff-led teams should be established (the City of Seattle defines these as “change teams”). These teams should support the mission defined in an agency-wide equity strategy by working to implement the strategy by supporting the development and implementation of department level work plans. Given the range of activities within Metro’s portfolio, convening functional-area specific change teams is an important step in ensuring equity is meaningfully incorporated into the work of all Metro staff. These teams can also serve as a sounding board for equity-related workplace issues and identify challenges specific to incorporating equity at a departmental level. It will be important that the Diversity Program Manager be involved in the work of these teams as it could have direct impact on this position’s work program.
- In addition to establishing staff led teams, an agency-wide formal team should be created. The team should consist of representatives from the staff led teams, members from the Senior Leadership Team, potentially Metro Council (if appropriate), and the Diversity Program Manager. The purpose of this team is to provide a space for sharing the development of equity work plans in each department, identify common challenges and barriers, and share best practices. This team will also help guide the development of implementation tools. This team could also potentially provide internal consulting services throughout the agency. Considerable training is needed to ensure that the members of this team have the capacity and skills to support this work.

**Recognize opportunities for collaboration |** The inventory reveals that a range of staff is incorporating equity into their work. While some have shared data, information, and techniques, staff is missing an opportunity to better leverage and learn from one another’s work. As Metro becomes more consistent with incorporating equity, mechanisms for collaboration and information sharing should be developed and defining an agency-wide strategy will help provide the direction staff need to facilitate opportunities for collaboration.

**Determine how to move forward with HUD Sustainable Communities grant work program** | While the region's HUD Sustainable Communities grant proposal was unsuccessful, important relationships were established. In addition, the grant team developed a number of work programs that began to address existing inequities. Certain aspects, such as Opportunity Mapping, are moving forward. However, discussions should take place to identify how the aspects of the work program outlined below can be implemented.

- Seek funding and partnership opportunities to further program goals
- Engage community based organizations through existing programs
- Complete opportunity mapping, share results
- Apply existing grant resources, if possible to support target area projects
- Improve research methods for housing needs and housing & transportation costs
- Share housing need analysis with local and regional agencies to facilitate coordinated investments
- Encourage consortium members to convene and let Metro know of regional issues, including regional fair housing analysis

**Require staff training around equity** | To ensure that equity is fully incorporated at Metro, staff need to understand the dimensions of equity and how their work intersects with these issues. This will require a range of training opportunities for staff and leadership, ranging from understanding how inequities are systemic and play out individually, institutionally and structurally; cultural responsiveness or awareness training; and training on how to apply pro-equity tools that fit program needs and support tracking and measurement processes to support equitable outcomes.

**Distinguish between diversity and equity** | With the update of the Diversity Action Plan and the hiring of the Diversity Program Manager, diversity and equity are often used interchangeably in many conversations at Metro. While these are both important focus areas, they are not synonymous and the advancement of each requires different strategies and actions. Additionally, while the Diversity Program Manager should be intimately involved in the work being done to incorporate equity, this position should not be tasked to lead the development of an equity strategy and framework. Given the breadth of responsibilities tasked to this position and the internal work that needs to go on at Metro to develop cultural awareness, the Diversity Program Manager will not have the capacity to devote to moving the equity work forward in the short-term.

**Examine Metro committee structures and membership** | The current Diversity Action Plan includes specific goals around ensuring that citizen advisory committee membership reflects the diversity of the region's population. The plan also outlines several strategies to work towards this goal; the strategies range from increasing outreach to underserved communities to better understand existing barriers to participation, broadening committee member selection criteria to ensure underserved populations are represented, and to considering changes in committee bylaws to broaden membership opportunities.

**Support Metro's public involvement committee** | Metro is currently reforming the make-up and role of the former Metro Committee for Citizen Involvement in an effort to more effectively represent diverse interests and needs. The proposed new process includes a semi-annual meeting of professional public

involvement peers, an annual stakeholder summit and the establishment of a new standing public committee, the Public Engagement Review Committee (PERC). Metro staff will also conduct an annual public survey and subsequent annual report to the PERC and Metro Council to evaluate Metro's public involvement efforts.

**Revise Metro 101** | The Metro Council, staff and partners need improved messaging tools to build trust in Metro and meet equity and diversity goals. This messaging toolkit will answer the question, *What is Metro?* for English- and limited English proficiency audiences who are not familiar with the agency. The goal is to create a suite of existing and new materials that can be used independently and together to present Metro's work to a diversity of audiences. The toolkit will accompany the Metro event kit, and will increase the effectiveness of outreach for all priority projects. This work is in progress and may need additional support to ensure that materials are tested with internal and external audiences to assess their effectiveness and advance cultural awareness. Some materials should be provided in languages other than English and Metro should work with external partners to prioritize materials for translation.

**Develop decision support tools** | There are a growing number of implementation and evaluation tools that can provide guidance on how to incorporate equity. For example, the City of Seattle has developed a range of tools to be used by their employees; Multnomah County, through the Health Equity Initiative, has also developed an *Equity and Empowerment Lens* to guide the county's work to eliminate the root causes of social injustices that lead to racial and ethnic health inequities. A range of existing decision support tools could be adapted to meet Metro's needs – from equity budget tools to project scoping lenses to performance measurement and evaluation tools. Again, Metro can build on the current work of partner agencies and jurisdictions.

The recommendations provided above are based on the findings that came out of the internal survey of Metro activities. In addition, some recommendations are informed by research on local and national approaches to developing equity strategies and frameworks. Table 1 links these recommendations with a number of corresponding findings that also came out of these efforts. The following table is not intended to be an exhaustive summary of the relationship between each finding a recommendation, but rather a summary of the key findings that relate to each recommendation. Table 1 is also not intended to be a detailed work plan, but rather a summary guide that outlines the rationale behind each recommendation. Additional work is needed to identify staffing and funding resources for each of the recommendations.

**Table 1: Metro equity inventory recommendations and findings**

Recommendation	Findings	Rationale
<b>1 Build on current work</b>	Current Metro activities provide direction to move forward (Opportunity)	There are existing efforts underway to incorporate equity into Metro activities; these efforts can provide a strong foundation to build a regional strategy and framework.
	Momentum is building despite limited resources (Opportunity)	Staff is pursuing opportunities to incorporate equity despite limited resources. A number of projects have received outside resources and grants, which has supplemented existing resources to conduct additional work around equity.
	Staff motivation in absence of guidance and structure (Opportunity)	There is a growing number of staff that are motivated and interested in learning how they can incorporate equity into their work.
<b>2 Invest in relationship building</b>	Metro’s unique portfolio of activities (Limitation)	Time spent on building relationships with community organizations and partner agencies can facilitate an understanding of how other organizations are advancing equity.
	Lack of agency strategy (Limitation)	Building relationships with community partners and leaders working in the equity field can help strengthen the development of an agency-wide strategy.
	Lack of definition (Limitation)	Given Metro’s limited capacity and experience working on equity, it is important to develop lasting relationships with organizations and community leaders who have extensive experience and knowledge of equity issues. These community resources should be relied upon to help define regional equity and develop a strategy and framework.
	Inconsistent efforts to build and	While Metro has taken steps towards building important relationships, more time and staff resources are needed to maintain existing—and build new—relationships.

	maintain relationships (Barrier)	Developing more consistent engagement approaches can help strengthen needed relationships.
	Metro’s focus on geographic and health equity (Implementation considerations)	While geographic and health equity are important dimensions of this work, as an explicit strategy they do not typically ensure increased staff capacity to advance other dimensions of equity or across oppressions. By building relationships with partners who focus on other dimensions of equity, Metro can better understand how to more strategically advance a broader range of equity issues.
	Advisory committees provide limited opportunity for consideration and discussion around equity (Role of leadership)	Investing in relationships with partners working on equity related issues will not only build internal capacity, but can also facilitate capacity building for community organizations and leaders. This capacity building can help provide more opportunities to regional decision-making processes by these organizations and groups.
	Current Metro activities provide direction to move forward (Opportunities)	A number of current activities are finding innovative ways to build and maintain relationships – these efforts should serve as a foundation for moving forward.
<b>3 Conduct formal equity audit</b>	Lack of definition (Limitation)	Through an exploratory process of identifying structural and institutional barriers, an equity audit can help formulate a consistent and strategic definition of equity as it relates to Metro’s activities.
	Metro’s unique portfolio of activities (Limitation)	An equity audit would help identify strategies to address Metro-specific challenges and structural barriers to advancing equity.
	Staff capacity (Limitation)	Conducting an equity audit will help highlight the current limitations that result from a lack of staff capacity to advance equity within the context of their work.
	Staff knowledge (Limitation)	Conducting an equity audit will help highlight the current limitations that result from a lack of staff knowledge on how to advance equity within the context of their work. An audit will provide information on existing knowledge gaps and identify effective training opportunities.
	No active internal or organizational leaders (Role of leadership)	An equity audit will help clarify the need for Metro leadership to take an active role in ensuring a strategic approach to advancing equity.
	Advisory committees provide limited opportunity for consideration and discussion around equity (Role of leadership)	Several Metro committees that have some flexibility in membership have become more intentional about recruiting members from diverse communities, however an equity audit will help identify other participation barriers that exist within Metro’s committee structure.

<b>4 Establish formal work teams</b>	Staff capacity (Limitation)	Formal work groups will provide the leadership space for staff that has the capacity and knowledge to support equity work and will continue to provide the space for additional staff as they become ready.
	Staff knowledge (Limitation)	Developing formal workgroups will provide the structure to allow staff the time and space to learn about, and explore, the structural and institutional barriers that impede their work. Formal workgroups will also provide the space for staff to share knowledge about solutions to addressing these issues.
	Lack of definition (Limitation)	Formal workgroups can provide the space for staff to engage in a conversation and process to develop a definition of equity relevant to Metro’s work.
	No clear guidance on best practices or implementation even when mandated (Implementation considerations)	Formal work groups can provide a setting to explore promising practices to advancing equity, especially for mandated requirements. Equity workgroups provide structure to allow for information sharing on best practices at Metro.
	No active internal or organizational leaders (Role of leadership)	A formal group would allow dedicated space and time for staff to focus on equity related issues, including Metro leadership. If work groups had funding they could support additional work throughout the agency by providing technical guidance to others within the agency.
	Staff motivation in absence of guidance and structure	Formalizing current informal efforts to coordinate around equity issues would provide validation to these efforts and ensure transparent communication across the agency.
	Momentum is building despite limited resources	Formal work groups would provide the opportunity for Metro to capitalize on the growing momentum to advance equity considerations throughout the agency.
<b>5 Recognize opportunities for collaboration</b>	Internal efforts are inconsistent (Limitation)	Current efforts provide a strong foundation and demonstrate examples of best practice approaches in specific instances. Identifying opportunities to collaborate can reduce inefficiencies throughout the agency and better align outcomes.
	Inconsistent efforts to build and maintain relationships with underserved communities (Barrier)	Metro’s past engagement processes around regional equity have not been coordinated, consistent or sustained. Identifying opportunities for internal and external collaboration can help address these challenges.
	Limited time to build partnerships	Working to better coordinate Metro activities through collaborative approaches, both internally and externally, can help ensure efficient use of resources.



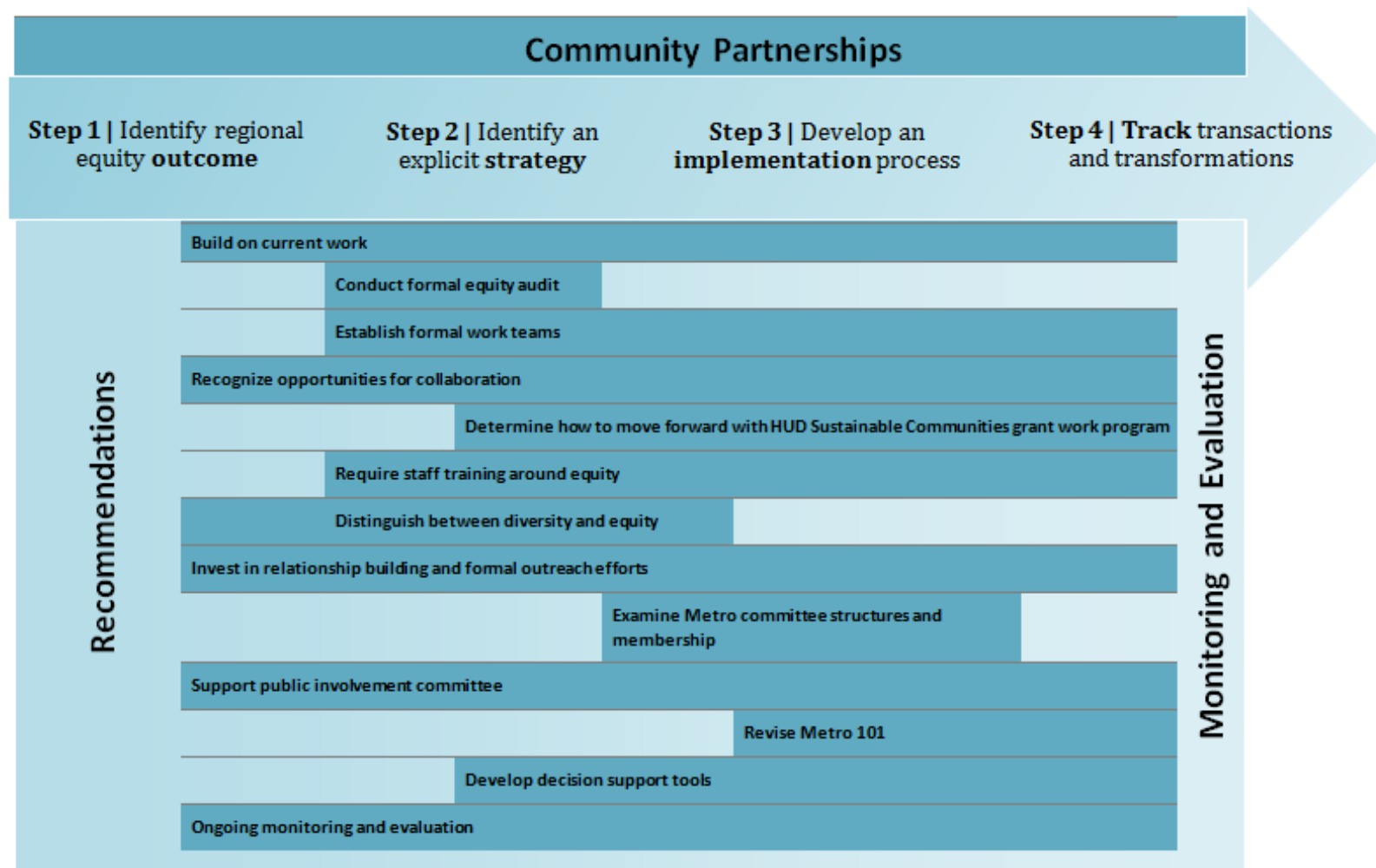
<b>6 Determine how to move forward with HUD Sustainable Communities grant work program</b>	Lack of agency strategy (Limitation)	The HUD Sustainable Communities grant process represents significant effort, both internally and externally, to better advance regional equity issues. This work can help inform aspects of an agency-wide strategy.
	Inconsistent efforts to build and maintain relationships with underserved communities (Barrier)	Important relationships were established and strengthened during the last HUD grant process. These efforts should not be lost or overlooked.
	Advisory committees provide limited opportunity for consideration and discussion around equity (Role of leadership)	The HUD grant process identified the need to provide meaningful capacity building opportunities to communities throughout the region. This work explored the concept of providing assistance for community members to actively participate in Metro’s advisory committee.
<b>7 Require staff training around equity</b>	Incomplete data (Limitation)	While data limitations will continue to persist, even with an agency-wide strategy, some limitations can be overcome if there is better understanding of the intended equity outcome and/or related issues.
	Staff capacity (Limitation)	To ensure that equity is fully incorporated at Metro, staff need to understand the dimensions of equity and how their work intersects with these issues. Training would provide the opportunity to start building this capacity.
	Staff knowledge (Limitation)	To advance equity considerations, it is important for staff to understand how inequities are systemic and play out individually, institutionally and structurally.
	Inconsistent efforts to build and maintain relationships with underserved communities (Barrier)	Staff and leadership training will help Metro become better equipped to engage with underserved communities and other regional partners.
	Staff does not always agree with existing programs or policies (Barrier)	Providing training to all Metro staff will help build the support for existing and new equity related mandated or regulated processes.
	Need to ensure legal compliance (Implementation considerations)	Training opportunities can help provide staff with information on how to ensure Metro maintains legal compliance in equity related areas. It will also help to ensure that Metro’s equity strategy is within the legal guidelines of the agency.
	Community organizations have led the call for equity (Role of leadership)	Training opportunities will provide capacity development opportunities to staff and leadership and help build internal champions for moving equity related work forward.
	Geographic and health equity perspectives have been primary drivers of current equity work	While geographic and health equity are important dimensions of this work, as an explicit strategy they do not typically ensure the development of tools that can be applied across oppressions or increase the ability to work on other dimensions of

		equity. By investing in staff training, Metro can expand its understanding of the many dimensions of equity and better position equity efforts to advance multiple dimensions at one time.
<b>8 Distinguish between diversity and equity</b>	Lack of definition (Limitation)	Defining regional equity will help clarify the difference between equity and diversity.
	Lack of strategy (Limitation)	Developing an explicit agency-wide strategy will ensure a more intentional examination and clarification of the relationship between diversity and equity.
<b>9 Examine Metro committee structures and membership</b>	Community organizations have led the call for equity (Role of leadership)	The current advisory committee membership and structure does not provide there is a pathway for ensuring equity perspectives are embedded in the regional decision making process. Community organizations have raised this issue and can provide information on how the existing structure does not ensure all communities are engaged in regional decision-making.
	Current Metro activities provide direction to move forward (Opportunities)	Work done by a number of programs have identified ways to improve regional decision-making processes. These opportunities should be explored within the context of regional decision-making bodies.
	Advisory committees provide limited opportunity for consideration and discussion around equity (Role of leadership)	Many community leaders and organizations have identified the need for more support to ensure members of their communities can participate as members of policy committees. Metro recognized this concern, and the 2011 HUD Sustainable Communities grant included a proposed grant program to provide resources for capacity-building to community-based organizations. While this grant was not funded Metro should consider how aspects of the proposal can move forward.
<b>10 Support public involvement committee</b>	Staff capacity (Limitation)	Increasing staff capacity around equity is needed to ensure that the reorganization (or repurposing) of the Metro Committee for Citizen Involvement adequately addresses regional interests and needs through an equity lens.
	Staff knowledge (Limitation)	Building staff knowledge around equity issues will help ensure staff understands the various ways in which equity can be incorporate it the agency’s daily activities. This knowledge base will help staff better advance equity issues that may be brought up by the Committee for Citizen Involvement, if and/or when it is reinstated.
	Inconsistent efforts to build and maintain relationships (Barrier)	A current proposal for the Committee for Citizen Involvement is to establish an annual stakeholder meeting with invitations focused on representatives from underserved communities. This proposal may help provide a more consistent venue to engage new partners.

<b>11 Revise Metro 101</b>	Staff knowledge (Limitation)	When developing materials to help explain Metro to the general public, attention should be paid to ensure that these materials are culturally relevant to all communities within the region. The process of applying an equity lens to these materials will help build staff knowledge around the equity dimensions of Metro’s work.
	Lack of flexibility to create unique communication mechanisms with standard policies and/or procedures (Barrier)	Because creating new communication mechanisms and techniques takes staff time and resources that are currently not dedicated, the Metro 101 material—if intentionally developed with an equity lens—can help to support project level communication efforts.
<b>12 Develop decision support tools</b>	Not one size fits all (Implementation considerations)	There is a growing number of implementation and evaluation tools that can provide guidance on how to incorporate equity. For example, the City of Seattle has developed a range of tools to be used by their employees, which could be adapted to meet Metro’s needs. These tools should be tailored to advance the unique dimensions of equity within the region, but also to Metro’s portfolio of activities.
	No clear guidance on best practices or implementation even when mandated (Implementation considerations)	Because little guidance is given on how to implement or actualize equity considerations at a project or program level—even when mandated—developing tools to help guide Metro’s work could help to address this information gap. Metro staff could be better equipped to effectively address mandated requirements.
	Role of guiding documents and policies (implementation considerations)	In the absence of an agency-wide strategy to advance equity considerations two divisions have taken a more strategic approach to advancing equity by developing guiding documents for division-level programs and projects. These existing efforts provide best practice examples of how guiding or strategic planning documents can serve as a tool for embedding equity within the agency’s work.

The recommendations presented above represent a range of actions that could be taken over a period of time; while these actions will take considerable time and consistent effort to implement, figure 2 outlines a potential sequencing of activities. This sequencing should be taken as a suggested conceptual framework for how to approach developing and implementing a consistent agency-wide equity strategy. Before action is taken further discussion and engagement is needed with both internal and external stakeholders, as well as extensive project scoping.

**Figure 2: Recommendation sequencing, conceptual framework**



## Section 1 | Findings and Recommendations

For detailed information on a series of Metro activities that intentionally incorporate equity considerations see the companion document to this report (*Section 2 | Supplemental Documentation*). This companion document provides detailed documentation of a cross-section of Metro activities that strategically incorporate equity into current practices.

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# Metro Equity Inventory Report

Section 2 | Supplemental Documentation

June 2012

 Metro | *Making a great place*

## About Metro

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy, and sustainable transportation and living choices for people and businesses in the region. Voters have asked Metro to help with the challenges and opportunities that affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to providing services, operating venues and making decisions about how the region grows. Metro works with communities to support a resilient economy, keep nature close by and respond to a changing climate. Together we're making a great place, now and for generations to come.

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The following document is intended to supplement the Metro Equity Inventory Report: Section 1 Findings and Recommendations. This companion document provides detailed documentation of a cross-section of Metro activities that strategically incorporate equity into current practices. This section is divided into two chapters which provide detailed information on the activities included in the Equity Inventory Report.

This supplemental document is not intended to be an exhaustive audit of all Metro activities, therefore there are a number of activities that were surveyed during Phase 1 that are not included in this final report. In addition, there may be a number of activities that have started since the onset of the inventory project. Conducting an exhaustive agency-wide inventory of all activities is beyond the scope of the inventory project due to staffing and resource limitations.

**Chapter 1 | Activities by approach** Chapter 1 summarizes Metro’s current efforts to advance equity by categories that reflect similar activities or types of work. Given the diversity of Metro’s portfolio of programs and projects, summaries are organized into categories to better highlight the emerging themes emerging from Metro’s current efforts to advance equity – even when work crosses departmental or agency boundaries.

**Chapter 2 | Activities by department** Chapter 2 provides a summary description of each Metro activity that strategically and intentionally advances equity considerations. Each summary includes information on what is being done to advance equity, why the work is being done, and how equity is considered within the context of each unique program or project. In addition, each summary includes a brief discussion of anticipated next steps, if applicable.

## CHAPTER 1 | FINDINGS BY APPROACH

The following is a summary of Metro activities that currently incorporate or advance equity considerations. Because Metro’s portfolio of activities is diverse and complex, each of the activity areas covered in the previous chapter have been organized into categories that reflect similar activities or types of work. By organizing this information by activity type, not department, it is possible to highlight emerging themes, even when the work crosses departmental or agency boundaries. Each summary includes a description of any similarities in approach as well as major differences. When appropriate, the inventory also highlights any best practice recommendations, opportunities for collaboration, and information sharing.

Each of the departmental summaries included in the previous chapter have been organized into the following activity categories:

- Regional Policy
- Engagement Programs
- Grants
- Analytical activities
- Service provision
- Internal Policy

## Regional Policy

The region has identified equity as a desired regional outcome, which staff has used as direction to include equity considerations in their work. However there is no agency-wide strategy to ensure regional policy decisions are working towards this outcome. While Metro does not have an agency-wide equity strategy or policy decision support tools, there are currently a number of programs and projects that advance equity issues.

The Transportation Planning and Resource Conservation and Recycling (RCR) divisions are in unique positions to advance regional equity issues. Both divisions have long-range planning documents that guide their work and both of which strategically and intentionally include equity as a guiding principle. By including division-specific equity goals, these documents have provided a framework for all activities in these departments. The Regional Transportation Plan (RTP) provides strategic direction to programs and projects within transportation planning; the RCR Strategic Action Plan provides strategic direction on the outcomes that each RCR program is working towards. These are the only two divisions within Metro that are at this stage of organizational readiness to advance equity. In other words, these are the only divisions that have identified equity as a central element of their work and have begun to take action to strategically incorporate it into their ongoing programs.

A key difference between these two divisions is the RCR strategic plan outlines guiding principles and goals as well as implementation mechanisms to build equity into each program. For example, the Recycle at Work (RAW) program used the division level equity goals and principles to guide the program strategic plan update process and outcomes. While the RTP only provides the goals and principles and does not provide implementation direction to other transportation planning programs.

Without strategic direction at the division, department or agency level, transportation planning programs have invested in and prioritized equity considerations to varying degrees. Some programs like the Regional Flexible Funds (RFF) allocation and the Regional Travel Options (RTO) grant program have taken strategic directions to better incorporate equity considerations into regional policy and decision making. However, this level of effort is not consistent throughout the division or all long range planning efforts and not having a division-level strategic action plan has lead to differential outcomes in regional transportation policy. That said the RTP division is further along the path of incorporating equity into regional transportation planning than other long-range planning divisions at Metro.

Several projects currently underway in the Planning and Development section of Chapter 2 will contribute to the level of understanding of how this department can better incorporate equity considerations in the future. The Opportunity Mapping project will hopefully provide the analytical support tools to better understand land use planning through an equity lens. These maps will provide a method of assessing equitable access to a variety of community services and facilities and provide invaluable information that can help inform a range of policy and project level work going on throughout the region.

While it is important that agency-wide guidelines be established for staff to advance equity, it is just as important that each division determine how to operationalize equity considerations. As individual divisions explore this, turning to those divisions who have done so already is an important first step. This collaboration and information sharing would serve the agency well as an equity strategy is developed for Metro as a whole.

### Engagement Programs

This section includes programs and projects that have intentionally reached out to underserved populations in the Metro region –groups that have often not been included in Metro’s traditional outreach activities. These programs and projects included in this category are the Regional Flexible Fund Allocation (RFFA) process, the East Metro Connections Plan (EMCP), and the Vamanos project. While the RFFA process and EMCP fall under Title VI mandates, the specific activities and the efforts in all four of these examples were staff driven with support from Senior Leadership.

Staff has recognized that Metro’s traditional engagement efforts do not reach important sectors of the region’s population and decided to increase their efforts. Several of these examples have utilized additional resources in order to do this outreach. For example, the Vamanos project is a result of outside grant money. The EMCP was able to utilize a temporary staff person who worked over the summer of 2011 to identify and meet with a broader range of individuals and groups than have been included in the past. Without this additional temporary staff support the project’s regular staff would likely not have had the time to set up these initial engagement opportunities. This initial outreach and engagement provided individuals and groups an introduction to the project and staff is now able to maintain contact to keep them engaged in the project.

Another mechanism to involve new voices in Metro’s work was the approach taken by the RFFA process. Staff pulled together a specific working group made up of representatives from the Environmental Justice (EJ) community. Two members of this working group sat on the Regional Flexible Funds Task Force to ensure the concerns and input from this working group were communicated to the Task Force, who made recommendations to the Metro Council on this process. Staff time was needed to staff this working group, however it provided an opportunity for members of the EJ community to have a more consistent way of providing input than had been offered in the past.

Staff’s efforts to broaden engagement reinforced the importance of relationship building as well as the importance of ensuring sustained engagement with stakeholders. Staff have also repeatedly raised the issue of having culturally competent staff whom can effectively interact with different groups, something that is largely missing at Metro.

Already staff has begun working together to get a sense of who is meeting and communicating with outside stakeholders to ensure that engagement efforts are coordinated. There is growing recognition by all Metro staff that programs and projects need to reach out to diverse audiences. Staff also realizes these efforts should be coordinated in an effort to not overburden community partners with numerous and disparate requests. This is a continued area of opportunity, and the projects described in the following section are examples of efforts to provide more equitable and meaningful engagement.

## Grants

Metro has a number of grant programs and, based on the inventory analysis, three programs are specifically advancing equity concerns. These are the Regional Flexible Fund Allocation process (discussed in other sections), the Community Enhancement Grants, and the Regional Travel Options (RTO) grants.

Unique to the Community Enhancement and RTO grant programs is the central role that equity plays in these programs. The Community Enhancement grant program was designed to address environmental justice concerns. The goal of the program is to mitigate the effects of the location of waste disposal facilities on communities and populations in the region that are disproportionately impacted by these facilities. Equity is therefore imbedded in the grant allocation process.

The RTO grants support projects to reduce driving-alone auto trips, improve air quality, and address community health issues. Over the life of this grant program, the staff, with community input, realized the need to include specific equity criteria as part of their grant selection process.

The grant programs provide valuable opportunities for communities in need to receive funding to provide services and programming to a diverse set of populations throughout the region. Because of a focus on equity, groups who may not have been able to secure funding from traditional funders have been able to access these sources of funding. The RTO grant program has reported that since adding an equity criterion their portfolio of grant recipients has shifted to include more community-based organizations working with low income and communities of color.

Grants in each of these programs are selected by committees, allowing for the opportunity for a small group of citizens to become more educated around the needs of a variety of populations in the Metro region. The grant selection committees for Community Enhancement grants are made up of residents of the target areas. The RTO subcommittee includes four community members along with technical staff from state, regional and local agencies, and governments.

Several of the grant programs, including the programs above and the Nature in Neighborhoods (NIN) Capital Grant program, have met to share best practice approaches –this type of collaboration should continue to strengthen these programs. Additionally, the NIN Capital Grant program is developing equity criteria, in part due to the work done by the Community Enhancement and RTO grant programs.

One common challenge among all programs is measuring the impacts of the grants. As these grant programs continue to consider equity in their selection processes, this will be an important area to focus attention. Further examination of the selection and award processes can provide useful information on how to expand grant opportunities to traditionally underserved communities.

## Analytical activities

The analytical activities covered in this section serve as regional decision support tools to larger regional planning and policy work. The Regional Flexible Funds (RFF) allocation and Opportunity Mapping use similar analytical methodologies and tools (GIS based) and are specifically designed to inform transportation and land use planning decisions. The Greater Portland Pulse (GPP) project was designed to inform a broad range of regional decisions by providing a shared set of indicators to track social, environmental, and economic well-being in the Portland region.

All three analytical processes incorporated engagement strategies as part of the process, mostly by engaging technical or topic area experts. The GPP process relied on an extensive engagement process with nine topic area teams (Results Teams) and one Equity Panel. The Equity Panel provided guidance on how equity should be considered within the GPP project. One of the goals was to ensure that Results Teams developed indicators that better reflect each topic area through an equity lens. This process reinforced the need to address the biases inherent in many existing data sets, sources and methodologies. Experience demonstrates that existing data do not adequately account for diverse populations and their issues, rendering invisible many communities of low income, immigrants, and people of color. One of the themes that emerged from this work was the need to disaggregate data by demographic characteristics including age, income, and race and ethnicity. However, the process also revealed that for many indicators, data are not available for disaggregation or mapping.

The RFF equity mapping and the Opportunity Mapping processes also reveal the same challenge of data availability and methods. While efforts were made to provide data at the most disaggregated scale for each of these analytical approaches, the challenges discussed above prove significant for this type of analysis. However, each of the analytical projects worked to find supplemental or proxy data to fill analytical or methodological gaps, when available.

The RFF equity mapping process provided a strong foundation for the ongoing Opportunity Mapping project and staff has worked to coordinate these similar technical approaches. While the RFF equity mapping was designed to serve a discrete allocation process, the Opportunity Mapping process is being designed to serve multiple interests and projects. Metro staff's intent is to develop a method and data sets that can be maintained over time—similar to the GPP indicators—in partnership with community stakeholders and partners. However, given data and funding limitations it is not yet clear how and when each of the data sets will be maintained. A number of data sources come from existing Metro data while other data are the result of a one-time study or data collection process. These coordination and maintenance issues are being explored as part of the project scope.

## Service provision

The programs included in the service provision category include the Hazardous Waste Roundup program and the Oregon Zoo's discount Tuesday and ticket donation programs. While Metro does not provide the same type or scale of services as local and county agencies, there are a few areas within Metro's portfolio where staff engage in direct service provision activities. Service provision activities that intentionally advance equity considerations are covered in this section.

The programs included in this section address issues of access to public resources and services. In addition, the Oregon Zoo's ticket donation and reduced ticket programs were designed to advance economic equity issues. All programs were developed with the intent of providing opportunities for low-income and traditionally underserved communities to better access regional services and goods.

The Hazardous Waste Roundup program was established to provide a more convenient HHW drop-off option for residents of the region, especially those more distant from a permanent facility. However, a key difference between this program and the programs mentioned above is that the roundup program only advances the issue of geographic equity and was not designed to serve low-income or traditionally underserved populations.

Because all programs in this section provide unique services there are limited opportunities for collaboration. However, because all of the programs were designed to advance a dimension of social equity, there may be opportunities for PES and Oregon Zoo staff to coordinate around collecting demographic data on who is currently receiving the benefits of these programs. Tracking demographic data through an equity lens requires collecting basic demographic data, at a minimum. The Oregon Zoo is currently working on improving the demographic components of their attendance survey so there may be opportunities to share this information with other service programs throughout the agency.

## Internal Policy

Metro has several examples of ensuring a range of populations have employment and contracting opportunities at Metro. Several of these examples are mandated by the State or Metro Code, while other areas are leadership and staff driven.

The Minority, Women and Emerging Small Business (MWESB) program and the MERC First Opportunity Target Area (FOTA) are examples of mandated programs. The MWESB program, while consistent with Metro's values, is also dictated by the Metro Code (2.04). The establishment of the FOTA policy was a result of an action by the Oregon Legislature when it provided funds for the construction of the Oregon Convention Center. It required Metro to pursue a policy of providing first opportunity for available jobs to economically disadvantaged residents living in economically distressed neighborhoods in the immediate vicinity of the Convention Center site. While both these programs are mandated, the agency continues to look at how to improve and strengthen these programs. The MWESB program is evaluated every year on performance, which is reported to the Metro Council.

The MetroPaint facility offers employment opportunities for workers affected by disabilities who would otherwise have a difficult time finding employment. This program with DePaul Industries was staff

initiated and has been in place for the last 15 years. It provides Metro with the staffing flexibility it needs for the MetroPaint facility.

The Diversity Action Plan, currently in the process of being updated, is working to ensure improvement in advancing diversity issues across the agency. At the request of the chief operating officer (COO), the Metro Council approved convening the Diversity Action Team in 2005. In 2010 the team took an active interest in updating the plan, making it more substantive to ensure that it provided measureable actions that Metro could take to address diversity. The plan ensures that the agency improves on its procurement approaches, some of which are addressed through the MWESB program, as well as helping to lay the groundwork to address issues of employee recruitment and retention, internal awareness around diversity issues, and improvement to public involvement and committee membership. While the plan outlines actions and strategies that require additional and unidentified resources, it will provide an invaluable tool as Metro continues to address the range of equity concerns throughout the agency and identifies where future investments need to be made.



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**CHAPTER 2 | FINDINGS BY DEPARTMENT**

Chapter 2 provides a summary description of each Metro activity that strategically and intentionally advances equity considerations. Each summary includes information on what is being done to advance equity, why the work is being done, and how equity is considered within the context of each unique program or project. In addition, each summary includes a brief discussion of anticipated next steps, if applicable.

Table 2 provides a summary of each activity included in the inventory. The table includes the type of activity, implementation level (department, division, program or project, except where otherwise noted) and whether the activity is mandated or voluntary. The table also identifies the drivers for these activities, which are grouped into the following categories: Metro Council, MERC, Metro staff, or Community. The table identifies the start date—or an approximate start date when the exact year was not known. Finally, Table 2 identifies whether or not the activity was guided or influenced by a guiding document and a staff contact.

**Table 2: Metro equity activities summary, by department**

Department	Activity Name	Activity approach	Implementation Scale				Mandated activity	Driver			Start date	Reference framework document(s)	Staff contact
			Department	Division	Program	Project		Council	Staff	Community			
Planning and Development	Regional Travel Options (RTO) Strategic Plan	Grants			✓		Federal		✓	✓	2007	Regional Transportation Plan Daniel.Kaempff@oregonmetro.gov Caleb.Winter@oregonmetro.gov	
	Active Transportation Demonstration Projects	Regional policy				✓	No	✓	✓	✓	2009	Regional Transportation Plan Lake.McTighe@oregonmetro.gov	
	Regional Flexible Funding Allocation	Regional policy			✓		Federal and State	✓	✓	✓	2002, updated in 2011	Regional Transportation Plan Amy.Rose@oregonmetro.gov	
	Vámanos!	Engagement				✓	No		✓	✓	2009	No Katie.Edlin@oregonmetro.gov	
	East Metro Connections Plan	Analytical				✓	Federal and State	✓	✓	✓	1990s, updated in 2010	Regional Transportation Plan Brian.Monberg@oregonmetro.gov	
	Southwest Corridor Plan	Analytical				✓	Federal and State	✓	✓	✓	2011	Regional Transportation Plan Crista.Gardner@oregonmetro.gov	
	Federally Funded Capital Projects	Regional policy		✓			Federal		✓		1990s	No Brian.Monberg@oregonmetro.gov	
	Opportunity Mapping	Analytical				✓	No	✓	✓	✓	2011	No Ted.Reid@oregonmetro.gov	
Sustainability Center	Resource Conservation and Recycling Division: Strategic Action Plan	Regional policy		✓			No	✓	✓		2009	No Matt.Korot@oregonmetro.gov	
	Resource Conservation and Recycling Division: Recycle at Work	Regional policy			✓		No		✓	✓	2010	Strategic Action Plan Will.Elder@oregonmetro.gov	
	Resource Conservation and Recycling Division: Toxics Reduction program	Regional policy			✓		No	✓	✓		2001	Strategic Action Plan Lisa.Heigh@oregonmetro.gov	

Parks and Environmental Services	Solid Waste Operations: Hazardous Waste Roundups	Service provision			✓		No		✓		2001	No	Jim Quinn <a href="mailto:Jim.Quinn@oregonmetro.gov">Jim.Quinn@oregonmetro.gov</a>	
	Solid Waste Operations: MetroPaint staffing	Internal policy			✓		No		✓		1995	No	Jim Quinn <a href="mailto:Jim.Quinn@oregonmetro.gov">Jim.Quinn@oregonmetro.gov</a>	
	Community Enhancement grant program	Grants			✓		state		✓		1985	No	Karen Blauer <a href="mailto:Karen.Blauer@oregonmetro.gov">Karen.Blauer@oregonmetro.gov</a>	
Visitor Venues	First Opportunity Target Area	Internal Policy	✓				State and Local	MERC			1989	No	Teri Dresler <a href="mailto:Teri.Dresler@oregonmetro.gov">Teri.Dresler@oregonmetro.gov</a>	
	Oregon Zoo	Service provision	Venue specific				No			✓	2010	No	Mark Williams <a href="mailto:Mark.Williams@oregonzoo.org">Mark.Williams@oregonzoo.org</a>	
Research Center	Greater Portland Pulse	Analytical				✓	No			✓	2010	No	Mike Hoglund <a href="mailto:Mike.Hoglund@oregonmetro.gov">Mike.Hoglund@oregonmetro.gov</a>	
Agency Wide Practices	Opt In	Engagement	✓				No		✓	✓	2011	No	Patty Unfred <a href="mailto:Patty.Unfred@oregonmetro.gov">Patty.Unfred@oregonmetro.gov</a>	
	Diversity Action Plan	Internal policy	Agency				No		✓		2005, updated in 2010	No	Cary Stacey <a href="mailto:Cary.Stacey@oregonmetro.gov">Cary.Stacey@oregonmetro.gov</a>	
	Minority, women and emerging small business (MWESB) program	Internal policy	Agency				No		✓		1990s	No	Mary Rowe <a href="mailto:Mary.Rowe@oregonmetro.gov">Mary.Rowe@oregonmetro.gov</a>	
Community Investment Initiative	CII Equity Workgroup	Regional policy				✓	No		✓	✓	✓	2011	CII Equity Framework (in process)	Joel Schoening <a href="mailto:Joel.Schoening@oregonmetro.gov">Joel.Schoening@oregonmetro.gov</a>

## Planning and Development

Within Planning and Development there are two sections: Project Development and Community Development. All the activities of this department are guided by the region's six desired outcomes. However, the department's strategic plan is dated and does not provide guidance on how these activities will advance or respond to equity considerations. Because of this, each section has a different approach or rationale for advancing equity considerations.

While the Planning Department's strategic plan does not provide direction or guidance for how programs and policies within the department should advance or respond to equity concerns, the 2035 Regional Transportation Plan (RTP) provides an outcomes based framework for all transportation planning activities within the department. In addition, Title VI of the Civil Rights Act of 1964 prevents discrimination by government agencies that receive federal funds. Title VI, as well as National Environmental Policy Act (NEPA) and SAFETEA-LU metropolitan transportation planning guidelines require a number of reporting, engagement and needs assessment activities, which also guide all transportation planning activities. Title VI prohibits discrimination in any program or activity that receives Federal financial assistance. In most cases, when a recipient receives Federal financial assistance for a particular program or activity, all operations of the recipient are covered by Title VI, not just the part of the program that uses the Federal assistance. In addition to these federal requirements, the 2035 RTP strategically incorporated equity as a goal as a result of Metro Council and staff motivation, as well as community input.

The 2035 RTP calls for an interconnected and multi-modal transportation system that provides safe and affordable travel choices for everyone, equal access to work, education and nature for the region's residents. The plan must also ensure that the benefits and impacts of transportation decisions are equitably distributed to all people, regardless of race, national origin, or income. In addition, the plan highlights meaningful participation as a value to guide this work.

The plan includes an equity goal and several equity-related objectives:

**Goal 8: Ensure Equity** The benefits and adverse impacts of regional transportation planning, programs and investment decisions are equitably distributed among population demographics and geography, considering different parts of the region and census block groups with different incomes, races and ethnicities.

- **Objective 8.1 Environmental Justice** Ensure benefits and impacts of investments are equitably distributed by population demographics and geography.
- **Objective 8.2 Coordinated Human Services Transportation Needs** Ensure investments in the transportation system provide a full range of affordable options for people with low income, elders and people with disabilities consistent with the Tri-County Coordinated Human Services Transportation Plan (CHSTP).
- **Objective 8.3 Housing Diversity** Use transportation investments to achieve greater diversity of housing opportunities by linking investments to measures taken by the local governments to increase housing diversity.
- **Objective 8.4 Transportation and Housing Costs** Reduce the share of households in the region spending more than 50 percent of household income on housing and transportation combined.

- **Objective 3.3 Equitable Access and Barrier Free Transportation** Provide affordable and equitable access to travel choices and serve the needs of all people and businesses, including people with low income, children, elders and people with disabilities, to connect with jobs, education, services, recreation, social and cultural activities.

In addition, the RTP includes several equity-related definitions:

- **Equity** In transportation, a normative measure of fairness among transportation system users.
- **Environmental justice (EJ) community** A U.S. Census block group that has a concentration of people living in poverty, people with low-income, people of color, elderly, children, people with disabilities, and other populations protected by Title VI and related nondiscrimination statutes. “Concentration” shall be defined as having two or more socio-economically sensitive populations in a Census Block Group of any of the groups listed above greater than 2.5 times the regional percentage based on the most recent actual census bureau data. This includes minorities, seniors, and people with disabilities, low-income, or those who do not speak English.
- **Environmental justice populations** People living in poverty, people with low-income as determined annually by the U.S. Department of Health and Human Services Low-Income Index, people of color, elderly, children, people with disabilities, and other populations protected by Title VI and related nondiscrimination statutes.
- **Equitable access** Equal opportunities low-income residents and people with disabilities to access the regional transportation system.
- **Transportation disadvantaged** Persons potentially underserved by the transportation system Individuals who have difficulty in obtaining important transportation services because of their age, income, physical or mental disability.

Federal requirements direct Metro to update the federal portion of the RTP at least every four years. The next scheduled update is required to be complete in 2014. Staff will review both the analytical and engagement processes to continue to improve how equity is considered in the planning and decision-making process. Staff will continue to use the definitions of equity as applied in the 2035 RTP, unless major shifts occur in public thinking and practice or Metro has formalized notions of equity and guiding principles of how to apply it to this program by then.

Each of the transportation and corridor planning projects and programs described below reference the RTP as a guiding framework document. Many programs also use the RTP Equity and Environmental Justice definitions in the absence of an agency wide definition. The following sections provide an overview of the planning and development activities that strategically advance or incorporate equity considerations.

### Regional Travel Options (RTO) Strategic Plan

The Regional Travel Options (RTO) grant program provides federal transportation funds to support projects that improve air quality, address community health issues, reduce auto traffic and create more opportunities for walking and biking.

**What |** In 2007 the RTO program formally included equity as a criterion in their grant program. Equity had been a consideration in grant selection, but this consideration has become stronger over the last 5 years. Staff has engaged RTO subcommittee members, community partners, and members of the public in establishing this criterion.

**Why |** Community stakeholders and Metro staff raised equity as an issue that needed to be advanced. Additionally, the Regional Transportation Plan brought the issue to the forefront for Metro staff and provided the opportunity for a revision in the strategic plan to include equity as a grant criterion.

**How |** Grantees are asked to describe how they will address the equity criteria in their grant application. The RTO subcommittee is directed to evaluate the grant applications using a list of criteria, including equity. Inclusion of the equity criterion has affected funding decisions. For example, several applications have been turned down because they lacked an equity focus. At the same time, community based organizations addressing equity issues, such as the Community Cycling Center, Organizing People Activating Leaders (OPAL), Hacienda, and housing authorities, have been awarded funds for the first time. The inclusion of this criterion has led to more funding being allocated to fund activities addressing inequities as compared to funding activities more focused on employee outreach.

**Moving forward |** The RTO Strategic plan is still being updated and some aspects of the plan will be strengthened. The consultant recommendation is to more closely align the program with the RTP and to achieve triple-bottom line outcomes including social equity. The recommendation includes reforming the subcommittee in order to attract higher-level stakeholders and community members to think strategically about achieving outcomes including outcomes related to equity. Completing this inventory prompted staff to think about equity across the entire program budget, in addition to the grant portion.

### **Active Transportation Demonstration Projects**

Metro is working with regional partners to increase the region's effectiveness in development and secure funding for the region's network of on-street and off-street bikeways and walkways integrated with transit and supported by educational programs. In 2009-10 Metro's Active Transportation Project identified a set of twenty-seven active transportation demonstration projects around the region.

**What |** These projects were evaluated using a set of criteria, including environmental justice. The criteria developed for the evaluation will be revised and used in the development of a Regional Active Transportation Plan in 2012.

**Why |** Equity is one of the Metro Council's six desired outcomes. Staff use these adopted outcomes to guide their work and decisions. Equity is also a value that many staff holds and which guides their work. Equity considerations, as a criterion, were explicitly included in this particular project because of individual staff concern and overall policy guidance from the Metro Council. Additionally, the Active Transportation work program impacts how federal transportation funding could be allocated to future bicycling and walking projects in the region, therefore, per federal mandate, equity must be considered in all work elements.

**How |** The main equity consideration was how well the bicycling and walking projects would serve environmental justice communities, either by increasing the access to biking and walking facilities within those communities and by providing access to essential services and destinations by increasing transportation options. The evaluation involved mapping sensitive populations and evaluating the access these populations had to the demonstration projects. Some technical mapping was done specifically GIS mapping of population data, non-auto infrastructure and services. Diagnostic maps

showing the presence of the Environmental Justice locations, indicating are Census Block Groups that are impacted by more than one category of sensitive populations.

It is important to note that equity will be a major consideration in the upcoming Regional Active Transportation Action Plan. Using outcomes of the Regional Flexible Funds, Opportunity Mapping, East Metro Connections Plan, and this Equity Inventory will help define equity and refine methodologies for the planning process.

**Moving forward** | Equity will be a major consideration in the upcoming Regional Active Transportation Plan. Using outcomes of the Regional Flexible Funds, Opportunity Mapping, East Metro Connections Plan and Equity Inventory will help define equity and refine methodologies for the planning process. Staff is also reviewing new sources of material to get additional information (e.g. East Multnomah Health Department Healthy Eating/Active Living Report).

### **Regional Flexible Funding Allocation**

Metro manages the regional flexible fund program whereby the Metro Council and the Joint Policy Advisory Committee on Transportation select transportation programs and projects for federal flexible funds. Flexible funds, though they comprise only about 4 percent of the transportation investment in our region, attract considerable interest because they may be spent on a greater variety of transportation projects than can most federal transportation funds.

**What** | This allocation process, per federal mandate, must consist of an analysis of the benefits and burdens on the full set of projects that will receive funds in a given cycle. This involves determining whether a community is disproportionately burdened by the project's impacts (positive and negative). This is intended to make sure that the impacts of the whole program have a balanced allocation. However, since 2002, staff has strengthened the analysis around equity. For the 2014-2015 funding cycle new analysis as well as additional engagement with the environmental justice community was done. Specifically, an Environmental Justice working group met several times to provide input. In addition to the engagement efforts, additional analytical methods were used to inform the decision making process. Specifically, mapping both sensitive populations and then overlaying an analysis of non-automobile infrastructure and access provided a mechanism to evaluate the differential levels of access to essential services (basic needs) that exist throughout the region. This analysis was made available to local project sponsors to use in the development of projects for funding consideration.

**Why** | The Regional Flexible Fund Allocation process involves the allocation of federal dollars to programs and projects throughout the region and thus requires compliance with Title VI of the Civil Rights Act. Federal guidelines require that Metro document where protected groups live, identify transportation needs, and engage these groups in public involvement efforts. Metro staff has done their best to interpret the federal regulations to ensure compliance, but have gone farther than the regulations suggest for several reasons. One is staff belief in the importance of considering equity, the Metro Council's interest in Equity, the emerging energy around this issue within Metro as a whole and in other agencies, and citizens demanding that government be responsive to all people's needs.

**How** | The RFF equity mapping considered five primary elements, most of which were used to form a composite analysis profile. These five areas include demographic data including disability, non-auto infrastructure, transit access, access to essential services, and pedestrian and bike crashes.

The demographic data came from the 2010 census and American Community Survey. These demographic data were used to map areas with concentrations of low-income, minority, poor or no English, elderly, and youth. In addition, ramp deployment on transit and LIFT paratransit service was used as a proxy for disability because it is no longer included in the census. Because the disability demographic data came from a different source it was developed as a separate block group analysis layer and not included in the demographic composite. To produce a composite demographic profile using the Census categories listed above (excluding disability), concentrations were calculated at 1 and 2 standard deviations above the regional average. This analysis uses z-scores, a common statistical analysis and is based on block group geography. This analysis resulted in 1 standard deviation above the regional average signifying an “above average” concentration of environmental justice and underserved populations, whereas 2 standard deviations above the regional average signifies a “significantly above average” concentration.

Non-automotive infrastructure and access to transit characteristics were analyzed at the block group level. Z-scores were also calculated to gauge the relative service levels of block groups in relation to the regional average (above is well served, below is poorly served). In addition, a block group level analysis was completed to examine how well an area is served in terms of essential services (services needed for daily living). If an area is below the regional average, it is considered poorly served; above average is well served.

Pedestrian and bike crash data were overlaid on the composite maps as well as roadways with a high number of lanes and high speeds. The road data were included as a proxy for barriers to walking and biking.

The RFF analysis was in part developed through working with community leaders who participated in the Environmental Justice working group. This group helped to identify transportation needs of communities of concern (minority, low income, elderly, disabled etc.). The analytical approach outlined above took 4 months, including meeting with the Environmental Justice working group, development of the methodology and conducting the analysis. The working group also helped inform a task force charged with developing criteria for developing and prioritizing projects. In addition, staff conducted an informational conference call with the Kirwan Institute to discuss the Opportunity Mapping methodology.

**Moving forward** | Staff will review both the analytical and engagement processes and develop some recommendations for how to better integrate equity in the next round. Staff will continue to use the definitions of equity applied to this RFFA cycle, unless major shifts occur in public thinking and practice or Metro has formalized notions of equity and guiding principles of how to apply it to our program by then.



### Vámanos!

In 2009, Kaiser Permanente awarded Metro Regional Travel Options a \$75,000 grant to support creating a project to help Spanish-speaking residents in Cornelius, Forest Grove and Cornelius learn about places to bike and walk in their community

**What |** Metro is developing bilingual maps and highlight points of interest, history, commerce and transit stops as well as highlight parks, trails and natural areas. The goal of the project is to increase awareness of places to bike and walk among families in Cornelius, Forest Grove and Hillsboro. The project will have a specific focus on connecting with Latino families.

**Why |** RTO's efforts with the Vamanos project align with Metro's diversity and equity goals. RTO looked for ways to incorporate equity into the work we were doing in the grant program and also in our Bike There! and Walk There! outreach. Kaiser Permanente also had similar goals which led to RTO program applying for a Kaiser Permanente Community Benefit grant for the Vamanos project.

**How |** Staff is in the process of developing the maps. Map development has been informed by surveys, personal meetings and interviews, outreach, gatherings and events. Outreach included Adelante Mujeres, Centro Cultural, City of Cornelius, City of Forest Grove, City of Hillsboro, Kaiser Permanente, Metro, Virginia Garcia, Washington County Bicycle Transportation Coalition, Washington County, Willamette Pedestrian Coalition. Feedback from these stakeholders will influence the maps.

**Moving forward |** Staff is in the process of developing the maps. No immediate next steps have been determined.

### East Metro Connections Plan

The East Metro Connections Plan is mobility corridor refinement plan that will evaluate different types of potential investments in Fairview, Gresham, Troutdale, Wood Village and Multnomah County. A comprehensive analysis of the transportation system will illuminate effective ways to serve residents, businesses and those who travel through the area. The transportation work will be augmented with an economic opportunity assessment and a health equity assessment.

**What |** The East Metro Connections Plan is currently conducting additional health equity work per a grant from Multnomah County's Communities Putting Prevention to Work (CPPW).

**Why |** Equity is one of the Metro Council's six desired outcomes. As the first plan to come out of the updated RTP, there is a desire to align EMCP project goals with the six desired outcomes and the RTP goals. Equity is embedded into the EMCP project goals. There is also a recognition that the plan area has ethnic/racial diversity and low income populations, particularly from the analysis of the RTP and previous work. Stakeholders from local jurisdictions and nonprofits have been very interested in embedding equity considerations into the project analysis and recommendations.

In particular, Multnomah County has been a strong partner to work on health equity. They have provided a grant to the EMCP project. The CPPW grant has allowed staff to conduct an in-depth health equity analysis for this project. EMCP has been coordinating this work with other CPPW grantees, including the City of Gresham, which has been looking at healthy eating/active living as part of their comprehensive plan update.

**How |** Work is being done on both an analytical and engagement level. In terms of engagement, work began with an intern identifying key stakeholders in the community and meeting with them to get a better understanding of their needs, especially as it pertains to outreach.

On the analytical side, a Community Profile is being completed that includes the demographic profile of East Metro and analysis and mapping that shows where amenities such as food sources, parks and trails, schools, health care resources, among other amenities. This analysis is able to show what communities are lacking access to certain amenities. Evaluation criteria are being developed for project selection; it includes two explicit factors for “healthy communities” and “equity”, and implicitly advances equity in other areas. The equity criterion is specifically evaluating the projects based on whether they serve low-income, minority, non-English speaking, youth, elderly or disabled communities. The project will be developing criteria to be used in future projects.

The project is leveraging analysis from other Metro programs, most specifically through the data compiled per the flexible funds, and the data sets available at the regional level with the 2040 context tool. In addition, EMCP is looking at a more detailed level of analysis. First, INDEX a network based tool, the project is testing which links in the pedestrian and bicycle networks can provide the most benefits to the greatest number of residents at the taxlot level. Second, the project is assessing completeness and connectivity of the bicycle and pedestrian networks by neighborhood.

Because this project is working on a sub-regional level, much emphasis has been placed on data collection. This includes a survey of groceries and markets in the area to develop a food inventory, as well as assessing all parks in the area to define concentrations of park facilities. The project is also coordinating with Multnomah County atlas. While the project is using data from inputs such as NAICS and the 2040 context tool, the inventories are providing a more localized level of detail.

On the engagement side, approximately 30 interviews were conducted with stakeholders and community leaders to discuss ways to better integrate health and equity into the project. The steering committee includes stakeholders from catholic charities and other nonprofit organizations. The technical committee includes members from Multnomah County health.

**Moving forward |** The EMCP Steering Committee is in the process of selecting investments. Next steps include identifying funding and implementation for specific investments that improve health and equity, as well as sharing community asset information with stakeholders, including reports and maps.

### **Southwest Corridor Plan**

The Southwest (SW) Corridor study is a comprehensive land use and transportation planning study to identify and prioritize public investments in the 15 mile corridor between downtown Portland and Sherwood. The expected outcome is an integrated investment strategy and action plan to help communities promote economic development and good jobs and invest in safe, livable communities. It is a joint project of Metro, ODOT, TriMet, Multnomah and Washington counties and the cities of Portland, Beaverton, Durham, Lake Oswego, Tigard, Tualatin, King City, and Sherwood.

**What |** The Southwest Corridor is advancing equity in its public involvement efforts, as directed by Title VI, and in the existing conditions report. The existing conditions technical reports are being written on

several subject matters for the Southwest Corridor. Several of these technical reports advance equity issues, including subjects of affordable housing, demographics trends (Census and school data), housing and transportation costs, health outcomes, air quality, policy and regulatory incentives.

**Why |** Incorporating equity is emerging as a key outcome at the federal level and the Southwest Corridor is weaving it through project work. The SW Corridor staff first began incorporating equity considerations as part of submitting a Department of Housing and Urban Development Sustainable Communities Challenge Grant. Issues such as how this plan will accommodate affordable housing were explored as part of this grant submission. Despite the grant not getting funded, the staff has continued this focus and also expanded the work to look at health impacts.

**How |** Staff utilized data from Washington County's opportunity mapping to begin identifying areas of need. The evaluation approach for the SW Corridor existing conditions report reflects a scaled-down example to Opportunity Mapping. (See page 49 for more information on Opportunity Mapping.) They convened a SW Corridor Housing working group made up of affordable housing providers to collect data on the available affordable housing in the corridor. This information will be used as the plan considers how to accommodate affordable housing and explore the potential use of anti-displacement strategies. Staff also conducted a health impact assessment to analyze the opportunities for planning for physical activities in this corridor. The assessment was reviewed by a health working group. These assessments led to the Technical Advisory Committee identifying areas where certain indicators correlated to possible outcomes, helping to inform the evaluation criteria that are currently under development. Informal discussion groups were held with equity partners and affordable housing advocates to learn about their views of the corridor, opportunities and challenges they see in the corridor and ways that they get information. Demographic analysis was reviewed with project partners and used to facilitate conversation about identifying local resources to connect with diverse communities.

**Moving forward |** The information collected in the technical reports, which will form the basis of the Southwest Corridor Existing Conditions Summary Report, will form the foundation for the later evaluation of land use and transportation policy alternatives and investment decisions in the Southwest Corridor. An equity outreach plan was generated based on the demographic analysis and discussion with local partners, and will be implemented with their help.

### **Federally Funded Projects**

**What |** Capital projects that require federal funds must follow the requirements of the National Environmental Policy Act (NEPA), Title VI of the Civil Rights Act of 1964 (Title VI) and other relevant regulations that address equity and environmental justice. Within the planning department, these have included transit projects such as Portland-Milwaukie Light Rail, Portland Streetcar Loop, Columbia River Crossing, Lake Oswego to Portland Transit, Southwest Corridor Plan and East Metro Connections Plan. Other departments such as parks have also been subject to NEPA for trail capital projects that received federal funding.

**Why |** All recipients of federal funding must comply with Title VI. This prohibits discrimination based upon race, color or national origin for any entity receiving federal funds. Environmental Justice has been a consideration of NEPA for a long time. In 1994, President Clinton signed an Executive Order that

required all federal agencies to address environmental justice as part of their missions. Both the Federal Transit Authority and the Federal Highway administration require detailed Title VI plans for their recipients of federal funds, including Metro. The CEQ and DOTs provided guidance in the late 90s and the Federal Transit Administration is in the process of updating that guidance now.

**How |** In terms of the NEPA work, the actual methodology may vary project to project, but there are some key principles that have to be a part of the assessment. These have generally been reflected in Environmental Impact Statements (EIS) in both a community effects section, as well as a specific Environmental Justice chapter.

These principles include:

- Effective public participation strategies and outreach so that all affected communities have meaningful input into the decision making process. These may include targeted mailings and/or one-on-one interviews with specific communities. This also includes representation from Native American tribes and a specific plan for tribal coordination.
- The project has to define the effected geographic area, the socioeconomic and ethnic demographics in the area, and then assess the impacts of the project to ensure that environmental justice populations are not adversely affected by negative impacts relative to populations as a whole. This includes direct, indirect, and cumulative effects. The analysis is often done at a census tract and neighborhood level. The project must also ensure that any benefits of a project cannot be denied or delayed to sensitive populations.

**Moving forward |** Metro staff continues to ensure compliance with all federal requirements, including NEPA, Title VI and the Environmental Justice Executive Order. To meet the Title VI requirements, Metro is currently developing a Limited English Proficiency (LEP) plan that will primarily apply to Metro's MPO functions; however some applications of the plan will be made more broadly across the agency. This work is being coordinated with some of the Diversity Action Plan implementation actions, as there is overlap between these two activities.

### Opportunity Mapping

**What |** Opportunity maps provide a method of assessing equitable access to a variety of community services and facilities. These maps compare the location of various demographic and socioeconomic groups with the location of services and facilities such as: parks, transit, libraries, schools, grocery stores, banks, and social services. The Land Use Planning division's current efforts to integrate equity consideration into planning focus on creating opportunity maps. Opportunity maps, based on the methodology developed at the Kirwan Institute, support decision making by providing a social justice frame where equity is achieved through an opportunity based model.

Metro is undertaking this project in partnership with the Coalition for a Livable Future, which is updating its Regional Equity Atlas. Other partners include staff from Clackamas, Clark, Multnomah, and Washington counties. This effort focuses on developing a web-based tool that will allow Metro staff and stakeholders to create custom opportunity maps that may be used to inform a variety of investment and policy decisions.

Central to opportunity mapping are three decision support strategies for connecting to opportunity:

- A people-focused approach that gives families more choice in where to live and go to school.
- An in-place strategy that seeks to bring investment and resources into distressed communities.

- A linkages approach that connects low-income neighborhoods and residents to opportunity through improved transportation and social or business networking.

By framing transportation, land use and housing decisions around these strategies, opportunity mapping strives to support a transformative agenda where:

- Everyone has fair access to the critical opportunity structures needed to succeed in life
- Low Opportunity neighborhoods limit the development of human capital
- A Community of Opportunity approach can develop pathways that result in increased social and economic health benefiting everyone.

**Why |** Considerations of housing affordability date back to the 1966 formation of the Columbia Region Association of Governments (CRAG), which was designated as the region’s Metropolitan Planning Organization by the U.S. Department of Housing and Development (HUD) and the U.S. Department of Transportation. Since then there have been a number of statewide and regional planning goals that provide a legal and regulatory framework for advancing this issue.

- Statewide Planning Goal 10 (Housing) requires that Metro ensure adequate buildable land capacity to meet the housing needs of the region. Part of the consideration is affordability for different income groups.
- The Regional Framework Plan (RFP) describes six desired outcomes, including one which calls for the equitable distribution of the benefits and burdens of growth. The RFP also contains policies that call for housing choices and opportunities.
- The Urban Growth Management Functional Plan compels local jurisdictions to implement the above policies and includes Title 7 (Housing Choice) and Title 11 (Planning for New Urban Areas), which contain requirements that relate to housing affordability and equity.

In addition to these regulatory requirements, federal grants (e.g. HUD Sustainable Communities grants) are placing an increased emphasis on advancing equity concerns and it has become clear that Metro needs better tools for assessing equity considerations in its planning efforts. Further, Metro staff and community based input have been drivers for this work. Metro staff began utilizing Opportunity mapping in 2010.

**How |** Metro staff are working in collaboration with regional partners, community based organizations and institutions to compile data to support Opportunity Maps. Interpretation of data will involve visual review of maps and supporting supplemental analysis.

**Moving forward |** The analytical tools developed through the Opportunity Mapping process will inform land use and housing decisions by providing a more robust equity lens. Opportunity maps will be incorporated into planning efforts. Metro staff, in coordination with regional partners, will continue to identify indicators and improve data sources.

## Sustainability Center

There are four divisions within the Sustainability Center: Resource Conservation and Recycling, Conservation Education, Natural Areas Program, and Parks Planning and Development. The following section provides an overview of the Sustainability Center activities that strategically advance or incorporate equity considerations. At this point in time the inventory only includes activities in the Resource Conservation and Recycling division.

### Resource Conservation and Recycling Division Strategic Action Plan

The Resource Conservation and Recycling (RCR) Division advances the region's efforts to reduce greenhouse gas emissions, conserve natural resources, and protect the environment and human health. It includes three primary interrelated programs: Waste Reduction, Metro's cross-agency Internal Sustainability efforts and the cross-agency Climate Change Initiative. Each program works on a number of complex projects with an extensive array of stakeholders.

**What |** In 2010, the RCR division developed a 5-year Strategic Action Plan (SAP), which established equity as one of four goals to guide the division's work during implementation of the SAP. The RCR equity goal (Goal 4) is:

**Goal 4:** Invest in equitable involvement and benefits for all members of the community in implementing the program's strategies and actions.

In addition to developing an equity goal the division established guiding principles which are intended to guide the implementation of the plan's strategies and actions.

Equity was included as one of Division's guiding principles, which states:

*Make benefits available to all. The benefits of sustainability should be available to all members of the community. This will require the fair treatment and meaningful involvement of all people regardless of race, color, national origin or income.*

**Why |** The strategic inclusion of equity as a division level goal was a primarily a staff led, voluntary effort that emerged during the strategic planning process. The decision was also guided by the six regional outcomes and designed to align with the Metro Council's vision for the region, however it did not evolve out of existing department or division level policies.

**How |** These actions have resulted in two explicit outcomes for the division: first, all projects and programs need to consider equity when evaluating effectiveness; and second, the Research and Measurement (R&M) Team (a work team within the RCR group) is charged with developing equity evaluation measures to inform how well the division programs and projects are meeting this goal. While this is a work in progress, the proposed measures fall into three primary categories: 1) staff capacity, knowledge and readiness to advance equity, 2) equitable community involvement, and 3) equitable distribution of benefits from RCR programs. In addition to developing new measures, the R&M team conducted a survey of RCR staff, as well as Solid Waste staff in Parks and Environmental Services and Finance and Regulatory Services who have programs with overlapping work scopes. The survey was intended to identify if and how existing programs are incorporating and evaluating equity considerations currently.

**Moving forward** | The Research and Measurement Team will continue to develop and refine division level equity evaluation measures. In addition, R&M staff will work with division program staff to develop program level evaluation measures. Further, the R&M team and RCR staff will begin developing analytical methods and identifying potential data sources for each of the equity evaluation measures. These efforts will be incorporated into the RCR's FY12-13 budget proposal.

### Recycle at Work

**What** | During 2010-2011 Recycle at Work (RAW) staff and stakeholders reassessed the program's goals and objectives.

The program now has the following goal:

*Services are delivered equitably and barriers to participation by underserved and under-represented business sectors reduced.*

In addition to the new program goal, there are two objectives that support this work:

- Increase participation in the RAW program by underserved and underrepresented businesses.
- Provide culturally appropriate educational resources.

**Why** | The inclusion of equity as a program level goal was primarily staff and community led (community is defined in this instance as local government partners). While past work has been done around equity, it has not been explicitly called out as a program goal. The stakeholder group involved in establishing new goals for the RAW program also felt it was important to make equity a central consideration of the program. In addition to staff and stakeholder motivations, it is important to note that the RCR SAP and equity goal served as a framework and provided programmatic support for the RAW program revisions.

**How** | The RAW program has not yet defined the equity evaluation measures they will use to measure program effectiveness; however this effort will be coordinated with the concurrent Research and Measurement team's work to develop division wide evaluation measures. A starting point in this process will be to clearly define what "underserved" and "underrepresented" mean to the RAW program. The RAW team has also engaged local regional government partners (Washington Co., Clackamas Co., Portland, Gresham, and Beaverton) to help develop program specific equity considerations.

**Moving forward** | RAW program staff will coordinate the effort to design equity evaluation measures with the R&M team's concurrent work to develop division wide evaluation measures.

### Toxics Reduction program

**What** | Equity considerations are, to varying degrees, integrated into the evaluation process for each of the Toxics Reduction program projects, which includes project design, implementation, and evaluation.

For *project design* the following areas are considered:

- The cultural awareness and/or limitations of staff are recognized and considered in the project design phase.
- Consideration of the type of services offered
- Consideration of the location of the services offered

- Participation targets by specific groups, such as by county, or for young children and parents
- Assessment of potential barriers for meeting audience participation targets (for example, the Blue Lake intercept survey was conducted to learn more about Spanish-speaking visitors to the demonstration garden).

For *project implementation* the following areas are considered:

- Partnerships with organizations serving underserved populations
- Multilingual educational materials

For *project evaluation* the following areas are considered:

- Comparison of the actual audience participation versus intended audience.

**Why |** The inclusion of equity as a program level goal was primarily staff led. In addition to staff motivations, it is important to note that the RCR SAP and equity goal served as a framework and provided programmatic support for the Toxics Reduction program. In addition, a number of Metro’s goals are referenced as guiding or framing principles. These include: Goal 6: Support the development of a sustainable economy; Goal 7: Use best business practices to operate Metro sustainably, effectively and efficiently; and finally Metro’s adopted value of “Respect”.

**How |** Toxics Reduction program staff updated the existing evaluations process, which included developing a participant self-report survey that includes equity considerations in terms of gathering data concerning a participant’s zip code, gender, income, and age. These self-report surveys began in 2002 and first included age, gender, and the identification of families with children under eighteen years old. Some surveys, for specific projects, also included information requests about first language and income. The current program survey was first implemented in 2010, when it was used at Metro Household Hazardous Waste Collection Facilities. In addition, the survey administered at the Natural Gardening Workshops now includes a race and ethnicity question. The survey contents and frequency vary by program based on staff’s assessment of each program’s evaluation needs. Because these demographic questions are included in an existing survey, minimal time and resources area needed to incorporate these data into the existing program.

In terms of engagement, the Toxics Reduction program has minimal engagement of stakeholders other than local governments when it comes to equity considerations. Within the natural gardening side of the Toxics Reduction program, there was a discussion with stakeholders to determine the demand for Spanish language translations of natural gardening materials. Within the toxics reduction side, there are/have been partnerships with the Josiah Hill III Clinic and the Multnomah County Health Department. As well, past programs such as the Take Out Toxics (TOTS) project targeted (through advertising and recruitment) child care facilities that served less economically advantaged families; however this targeting was difficult and not always successful. In regard to engagement tracking, the Toxics Reduction program tracks partner organizations but not the individual constituents of these organizations.

Currently, the primary methods for achieving the program’s toxics reduction goal are through state and regional policy work with local and state governments, NGOs and outreach to individual residents. The majority of staff time and financial resources go to this work. Without increases or changes in resource



expenditure, the staff capacity to overcome the limits of this direct outreach approach cannot be addressed. Resulting from the division's SAP, staff is working to better incorporate equity considerations into existing and new programs; the Toxics Reduction program will use these division level recommendations and directions to enhance their current approach.

**Moving forward |** Toxics Reduction program staff will coordinate the effort to refine existing and design new equity evaluation measures with the R&M team's concurrent work to develop division wide evaluation measures.

## Parks and Environmental Services

There are three divisions within the Parks and Environmental Services (PES) department: Solid Waste Operations; Cemeteries and Administrative Services; and Parks and Property Stewardship. The Solid Waste Operations division has three programs that incorporate equity considerations or advance a social equity dimension.

### Solid Waste Operations: Hazardous Waste Roundups

**What |** Each year the Hazardous Waste Program schedules a series of roughly 35 hazardous waste roundups at various locations around the region. Roundup locations are selected with consideration of geographic equity, which is providing a reasonable level of HHW (household hazardous waste) service to all parts of the Metro region.

**Why |** The roundups were established in 2001 to provide a more convenient HHW drop-off option for the residents of the region more distant from the permanent facilities.

**How |** Metro staff developed the household hazardous waste roundup program in consultation with local government solid waste staff. Metro staff consider the driving time from various parts of the region to Metro's permanent HHW facilities and schedule roundup locations to serve the portions that are more distant, with an eye to providing a reasonably equivalent level of service to all portions of the region.

**Moving forward |** Aside from occasional check-in meetings with local government solid waste staff, there are no current efforts to modify the HHW roundup program.

### Solid Waste Operations: MetroPaint staffing

**What |** Metro partners with DePaul Industries, a Qualified Rehabilitation Facility (QRF) that provides jobs work workers affected by disabilities who would otherwise have a difficult time finding employment.

**Why |** As the volume of paint handled in the program grew, additional staff was needed to process paint. However, due to the fluctuating paint volumes and to the difficulties in obtaining new Metro FTEs it was decided that using a temporary service would be best. Under Metro's contracting rules QRFs must be utilized when they are available. While the decision to use a QRF was influenced by Metro's contracting policies, the decision was ultimately made at the staff level.

**How |** Utilizing workers from a rehabilitation non-profit like DPI is primarily a matter of obtaining management approval and budgeting for the expense in the program's Materials and Services budget. Once this is achieved a contract can be procured without a competitive process through the QRF exemption, so the process comes down to negotiating the details of the contractual Scope of Work.

**Moving forward |** There are no anticipated changes to the MetroPaint staffing program.

### Community Enhancement grant program

**What |** Since 1985, the Community Enhancement grant program has invested more than \$5 million in projects that benefit areas directly affected by Metro's waste disposal facilities. This grant was designed to address the inequitable burden placed on communities within proximity to regional solid waste disposal facilities.

Grants are funded to support projects that do one or more of the following:

- Increase employment and economic opportunities
- Rehabilitate and upgrade residential housing
- Preserve wildlife, marine and recreational areas for public enjoyment
- Improve public safety
- Enhance neighborhood appearance or cleanliness
- Improve viability of commercial areas and enhance the business environment
- Provide programs and training opportunities to benefit youth and elderly
- Create long-term improvements for neighborhood livability

Grants are open to nonprofit organizations located in the 4 target areas: NW Portland, North Portland, Forest Grove, and Oregon City.

Examples of projects funded by Metro enhancement grants include:

- Developing environmental education projects for at-risk youth
- Removing ivy and restoration in Forest Park
- Installing fire escapes at senior centers
- Producing summer concert programs in local parks
- Planting trees around community parks and main street boulevards in industrial areas.

**Why |** While not all awarded grants advance explicit equity issues, the grant program was designed to address environmental justice concerns. The goal of the program is to mitigate the effects of the location of waste disposal facilities on communities and populations in the region that are disproportionately impacted by these facilities. This program was established by the Oregon Legislature (SB 662).

**How |** Funds are generated from a 50-cent surcharge imposed on each ton of garbage disposed of at a facility. Projects must directly benefit residents or neighborhoods around the facility.

From the initial program development phase (per the Metro charter), community members define the funding guidelines, program goals, and committee structure. Outreach done to prospective applicants includes outreach to organizations that serve the community within the target areas, neighborhood associations and organizations of color. In addition, specific outreach is targeted to organizations that serve underserved populations. Neighborhood associations, organizations of color and other community based organizations nominate members to serve on the grant selection committees. The goal is to recruit committee members who represent the needs of the communities being served or who have shown a commitment to working with underserved populations in the target areas.

While the grant program was intentionally established to benefit communities who experience differential burdens associated with solid waste disposal facilities, the grant program does not have specific equity criteria. However, applicants are encouraged to secure contracts from local vendors and utilize Metro's MWESB program.

**Moving forward |** Enhancement Grant staff are beginning to gather data with Nature in Neighborhoods Capital Grant program to show how regional funding is being allocated to address the needs of communities. Staff may act on the suggestions of Darin Matthews (FRS) to add some questions in the grant application, specifically asking the grant applicants whether they adhere or go beyond

requirements laid out as part of the Equal Employment Opportunity guidelines and whether they have a diverse Board of Directors.

The Metro Council is poised to consider a recommendation generated by a mostly-internal task force related to the future of the agency's Community Enhancement Grant program. Originally established in 1985 by act of the Oregon Legislature, Metro's oldest environmental equity program called for the creation of a mitigation fund to compensate the community affected by the now-closed St. Johns Landfill. Additional enhancement grant programs have been (and may continue to be) created in association with other solid waste facilities in the region.

Metro's original intent for these programs was to help bring about equity outcomes for residents "hosting" garbage facilities in or near their neighborhoods. However, the programs lack explicit indicators that point to the ultimate fulfillment of goals. In the case of Metro's North Portland program, some residents have expressed interest in seeing the landfill transition from being a community "liability" to an asset. Without looking through an equity lens to establish meaningful performance measurements, Metro will not know when it has succeeded or if it is keeping its commitment to the community to meet goals for its program.

## Visitor Venues

The Visitor Venues include the Oregon Zoo, the Oregon Convention Center (OCC), the Portland Center for the Performing Arts (PCPA), and Portland Metropolitan Exposition Center (Expo Center). Through its Metropolitan Exposition Recreation Commission (MERC), business and community leaders set the strategic business direction for three of the venues: OCC, PCPA and Expo Center. Commission members are nominated by Clackamas, Multnomah and Washington Counties and the City of Portland and appointed by the Metro Council to serve four-year terms.

The Oregon Zoo also operates through a key public/private partnership through the Oregon Zoo Foundation (OZF) which is comprised of business and community leaders. While these venues provide unique and diverse services a number of business practices are consistent across venues. The following summary captures equity related policies and practices that apply to multiple venues as well as practices unique to an individual facility (the Oregon Zoo).

### First Opportunity Target Area

**What |** The venues, excluding the Oregon Zoo, strategically consider equity in their hiring practices through the First Opportunity Target Area (FOTA). FOTA provides first opportunity for venue job openings to residents who live within the FOTA boundaries.

**Why |** In 1989, Oregon Legislative House Bill 3075 provided partial funding for the construction of the Oregon Convention Center and required Metro/MERC directly, and through its contractors or agents, to pursue a policy of providing first opportunity for available jobs to economically disadvantaged residents living in economically distressed neighborhoods in the immediate vicinity of the convention center site. The MERC Commission formed an Advisory Committee on Development of Economic Opportunities to develop recommendations on how to implement the house bill requirements. The Advisory Committee recommended a geographic boundary in inner N/NE Portland, which became the “historic FOTA neighborhood”. It also recommended extending the mandate to all MERC venues (at the time those included: OCC, PCPA, Civic Stadium, and later, Expo Center) and to include purchasing opportunities as well as employment in the policy. The MERC Commission adopted these recommendations via MERC Resolution #38 in December of 1989.

The original role of the Advisory Committee was to monitor the compliance of the requirements for funding for the construction of OCC and report back to the Oregon State Legislature. Once that task was completed, the committee became dormant. In 1997, the MERC GM requested the Commission re-appoint the committee with a new charge – to evaluate efforts to provide economic opportunities for Target Area residents and minorities; to consider what had worked what had been less successful and to make recommendations for improvement. The MERC Commission approved Resolution 98-24 which accepted the report of the MERC re-appointed Advisory Committee on Development of Economic Opportunities and directed MERC staff to move forward to implement the recommendations contained in the report. In 2003, the MERC Commission contracted with a local employment consultant, Brister & Associates to assess the overall effectiveness of the FOTA program from 1997-2003 and issue conclusions and recommendations. The MERC Commission approved Resolution 03-33 which adopted recommendations from that assessment report.

**How** | Public notice of any venue employment opportunity is listed online at the Metro FOTA website and available fourteen days prior to general distribution. Applicants must meet the qualifying annual household income limit for the past 12 months of less than \$25,000 as an individual or \$40,000 for an entire household. Applicants are asked to complete a FOTA questionnaire to assist in determining eligibility. Metro HR places job advertisements in the following newspapers that serve the Target Area – The Portland Observer, the Asian Reporter, the El Hispanic News and the Skanner. Also, job announcements are emailed to 100+ target area resource centers and employment agencies. Metro participates in the following job fairs and many others on a one-time basis to advertise available positions and to connect with potential future Target Area applicants: Hispanic Chamber of Commerce Contracts and Employment Trade Fair; Urban League of Portland Job Fair; North Portland employer Council; Oregon Liberal Arts Placement Consortium; Open Meadow Youth Recruitment Fair; Portland Community College Career Fair; Portland State University Career Information Day; and Portland Community College Workforce Network Job Fair.

**Moving forward** | Visitor Venue and Metro staff are evaluating FOTA practices to determine if the current program and the “historic FOTA neighborhood” boundary still meets the original program intent. In response to regional demographic changes staff are undergoing an analysis of 2010 Census information related to current FOTA boundaries to evaluate whether or not the current boundary still reaches the intended target populations.

Staff are also conducting analysis and developing recommendations to improve operational implementation and develop program goals and measurements. In regard to ongoing outreach, staff holds an Open House two times a year, the intent of which is to showcase available venue jobs and contracting opportunities, as well as provide a means for relationship building and communication.

## **Oregon Zoo**

**What** | The Oregon Zoo provides two services that intentionally advance economic equity issues. The first is the Discount Tuesday program and the second is the Ticket Donation program.

**Why** | Both programs are intended to provide affordable options to those in the community that otherwise could not afford to visit the zoo. The Discount Tuesday program has been in existence for roughly 15 years and the Ticket Donation program for 10 years. The donation program was revised in 2011, which has led to some changes in regard to who qualifies.

**How** | Discount Tuesday: The second Tuesday of every month admission at the Oregon Zoo is \$4, compared to the general admission of \$10.50. Ticket Donation: Oregon Zoo staff work closely with a number of non-profit partners to provide discount tickets to organizations that work with low income families, children with health issues, and organizations that conservation issues.

**Moving forward** | There are no planned changes to the Discount Tuesday program. The Ticket Donation program recently went through a program revision process in 2011 which resulted in changes to the qualifying criteria.

## **Minority, women and emerging small business (MWESB) program**

For information on MWESB practices and requirements, see the Agency-wide business practices section on page 63.

## Research Center

The research center provides transportation modeling, spatial and regional economic analysis, and demographic forecasting services for Metro, its regional partners, businesses and the public. Most of the analytical and research based activities are completed at the request of other departments, regional partners or clients. Therefore, any analytical methods that strategically incorporate equity considerations are captured in the project and program descriptions for other departments. The following section does not cover all of the analytical activities within the research center but rather a discrete collaborate project that is not housed within one of the three Research Center divisions (Data Resource Center, Transportation Research and Modeling Services, and Economic Land Use Forecasting).

## Greater Portland Pulse

**What |** Greater Portland Pulse (GPP), formerly known as Greater Portland-Vancouver Indicators (GPVI), is a growing partnership that uses both data and dialogue to encourage coordinated action for better results across the region. The GPP began as a partnership between Portland State University's Institute of Portland Metropolitan Studies and Metro, throughout the process the partnership grew to include many organizations and individuals who have contributed time to the project. In economy, education, health, safety, the arts, civic engagement, environment, housing and transportation, Greater Portland Pulse data show where the region is successful and where it's lagging behind; where there's progress and where there's work to be done. The indicators often reflect who's being left behind and how communities—and the region—are impacted as a result.

**Why |** The GPP was originally intended to provide an overall assessment of performance related to nine indicator categories that encompass making a great place or region. The GPP was envisioned to be a “neutral” assessment of performance combined with consistent, up-to-date, and authoritative data.

However, at the first meeting of the GPVI Advisory Team on June 24, 2010, members expressed concerns about the biases inherent in many of our traditional data sets, sources and methodologies. Experience had demonstrated that existing data do not adequately account for diverse populations and their issues, rendering invisible many communities of low income, immigrants and people of color. The Advisory Team agreed to form an Equity Panel to provide guidance to the GPVI Advisory Team and nine Results Teams charged with developing inter-connected indicators of economic, social and environmental wellbeing. The panel produced a report in March 2011 that compiles and summarizes notes captured from five Equity Panel conversations, three of which were learning dialogues with Results Team co-leads. The proceedings were made available to all GPVI teams and to the GPVI Equity Panel. The GPVI Equity Panel members continued to participate throughout the GPVI start-up phase through the summer of 2011, including review and comment cycles of the first GPP report that was released in July.

**How |** A specially formed Equity Panel and the co-leads of each of nine Results Teams (one each for economy, education, civic engagement, arts and culture, health, safety, transportation, housing and environment) devoted time to discuss how equity should be considered within the GPP project. As a regional indicators project, the nine Results Teams worked for a year to develop quantitative measures that define 1) desired outcomes for the region, 2) drivers of those outcomes, 3) measures of progress

toward the outcomes and 4) data to support the measures. Conversations between the co-leads and the Equity Panel affected the teams' thinking on which indicators to choose and how to analyze and display the data. For Results Teams, policy and data experts for each of the nine areas represented as much diversity as possible in terms of geography, race and ethnicity, discipline and philosophy.

While there is not an equity specific outcome topic, there are indicators throughout each of the nine topic areas that provide data to help guide decision making through an equity lens; numerous GPP indicators are broken down by race and ethnicity whenever possible.

**Moving forward |** The GPVI Advisory Team recommended that the new GPP function be housed at PSU's Institute of Metropolitan Studies beginning February 1, 2012. As keeper of the GPP, PSU understands that equity will always be a serious factor and value in assessing regional performance. As such, the Equity Panel utilized in the development phase of the GPP may be called upon, as necessary, to review and advise on future GPP products and outreach activities.

At Metro, PSU and Research Center staff will be undertaking training on how to 1) access, utilize, and display GPP data relative to indicators; 2) ensure Metro program/project alignment with appropriate GPP outcomes and indicators, and; 3) ensure that equity considerations are consistently factored when utilizing GPP data and indicators.



## Agency-wide practices

There are several activities being conducted on an agency-wide basis that advance issues around equity. These activities help Metro employees ensure they are providing opportunities for people to engage with Metro's programs as well as provide employees with some level of direction around what is expected of them as they interact with the public and coworkers. The section below summarizes several activities that specifically advance issues of equity.

### Opt In

In January 2011, Metro launched Opt In, an online research panel that gathers public opinion from residents of the Portland-Vancouver metropolitan area. The goal of the new panel was to create a timely, cost-effective way for the region's residents to provide input into decisions affecting them and their communities. Panelists are asked to participate in one or two short online surveys each month.

**What |** By January 2012, the Opt In panel had grown to more than 11,000 members, with between 40 and 70 percent of members taking part in each survey. Compared to demographics of the region as a whole, however, Opt In is underrepresented in some categories, including race/ethnicity, suburban areas, lower educational attainment and more conservative political spectrum. In order for Opt In to be truly representative and effective, the participants must come from a diverse range of viewpoints, backgrounds, interests and communities. To accomplish this, Metro offered sponsorships to help community-based organizations recruit people in their networks to join Opt In. A desired outcome of the project was the development of long-term relationships with participating organizations to encourage diverse representation in Metro policies and projects and increase awareness and understanding about what Metro is and does.

**Why |** Metro's Opt In panel is part of a larger communication strategy aimed at creating broader and more sustained outreach with residents of the region. New tools and new partnerships are required to enable Metro to hear from a more diverse representation of the region's residents in order to make good policy decisions that affect our communities.

**How |** Seven community-based organizations participated in the Opt In sponsorship project, each receiving a \$5000 sponsorship:

- The Latino Network
- Oregon Opportunity Network
- OPAL Environmental Justice Oregon
- IRCO – Immigrant and Refugee Community Organization
- The Center for Intercultural Organizing
- Big Brothers Big Sisters NW
- Friendly House

Each group developed a proposal outlining activities that would encourage their members to join Opt In. Activities included Facebook posts, email blasts, newsletter stories, presentations, community events and advertisements. Participating organizations also are scheduled to review and provide feedback on Metro's Diversity Action Plan later this spring. The sponsorship project began in August 2011 and is slated to be complete in June 2012.

In addition, Metro contracted with Su Publico, a culturally relevant marketing firm to provide outreach to the Latino/Hispanic and African American communities. Su Publico has connected Metro to community events, assisted in setting up “town hall” meetings, provided social marketing outreach and advertising in Spanish language media.

**Moving forward** – A desired outcome of this project was to increase the participation of diverse audiences in the Opt In panel and to build a long-term relationship with the participating organizations. Participants have expressed a desire to continue to work with Metro in some capacity. Several organizations have shared ideas for future partnerships and ways they could participate in Metro policymaking and projects. All of the participating organizations signed up some members and many will continue to promote Opt In through their programs and outreach activities. Although we have not seen large increases in the percentages of racial and ethnic communities participating in Opt In, we have not only continued to add minority members but have seen slight increases in percentage of Latino/Hispanic and African American participation compared to the panel as a whole.

Metro and the Latino Network piloted a Spanish-language print survey that members completed and we are evaluating the ability to provide surveys in multiple languages. We have budgeted for additional sponsorship opportunities next fiscal year and are exploring other possibilities such as mobile applications (e.g., a higher percentage of the Latino population use smart phones than own computers), hiring a Spanish-language intern, and collaborating with community organizations on seeking capacity-building grant funding.

### **Minority, women and emerging small business (MWESB) program**

Metro's minority, women and emerging small business program is designed to increase access, remove barriers to participation and improve contracting policies.

**What |** The following policies are in places that provide for equity in the procurement and contracting process:

- Use of MWESB contractors for small dollar purchases under \$5,000.
- Bidding construction related projects under \$50,000 to only MWESB certified firms.
- Obtaining MWESB quotes on all purchases up to \$50,000.
- Requiring a good faith effort for MWESB subcontracting on construction projects over \$100,000.
- Including diversity as a standard evaluation factor in all agency RFP's over \$100,000.

**Why |** Metro's MWESB program began back in the mid-1990's as a result of the regional disparity done by state and local agencies in Oregon. At that time the Metro Code (2.04) was revised to set clear policy objectives for providing contract opportunities to women and minorities. Metro incorporates equity into its contracting and purchasing decisions in order to level the playing field for MWESB firms and because it is consistent with agency values. The Metro Council has continually supported contracting rules that ensure fair opportunities for minority, women and emerging small businesses (MWESB). While not required by State Law (ORS 279, Public Contracting Code), it is allowed as a means of supporting an agency's MWESB policies.

**How |** Proposals are evaluated in three categories: diversity of firm, diversity of workforce, and diversity in their contracting practices. Qualitative measures include a firm's past performance with engaging

local minority and women owned businesses as partners and subcontractors, as well as their commitment to use these firms on Metro's project (if selected). Quantitative measures include dollars and number of contracts awarded to MWESB firms on past projects. Metro collaborates with area agencies to measure the utilization of minority, women and emerging small businesses including City of Portland, Portland Development Commission, Multnomah County and Port of Portland. Metro also shares program improvements and recommendations to local groups that support small businesses, including OAME, NAMCO and MCIP.

**Moving forward** | Staff will be revising the policies used for MWESB participation for upcoming Zoo bond projects. This is being done in order to maximize diversity on large construction projects.

### Diversity Action Plan

The Diversity Action Plan is Metro's blueprint to uphold the organization's value of respect and to reflect the growing diversity of the region it serves. The plan identifies strategies and actions to increase diversity and cultural awareness at Metro in four key areas: internal awareness and diversity sensitivity, employee recruitment and retention, committee membership and public involvement, and procurement. Actions are prioritized across fiscal years 2011 through 2015 and reflect interdependencies among the goal areas.

**What** | As mentioned above, the plan focuses on four key areas:

- Internal awareness and diversity sensitivity
- Employee recruitment and retention
- Committee membership and public involvement
- Procurement

Each key area incorporates aspects of equity. For example, much of the work of the MWESB program, described above, advances equity considerations in the area of procurement. In the area of employee recruitment and retention, goals have been established to improve diversity in recruiting, hiring and retaining employees. To achieve these goals, Human Resources staff will establish a baseline for minority applicants and employee retention; conduct outreach and build relationships with underserved populations; improve diverse representation among hiring panels and integrate diversity into new employee orientation and performance evaluations.

For the internal awareness and diversity sensitivity focus area, there is not specific focus on equity issues, but issues of inclusiveness are addressed. Goals include establishing an inclusive culture and community of practice. To achieve these goals, staff from Human Resources and the Office of the COO will respond to results from the Cultural Compass 2010 Diversity Survey of Metro staff by: engaging with employees to refine the Diversity Action Plan; establishing active dialogue with employees regarding diversity; providing training to managers and staff; and putting tools in place to measure inclusivity, diversity and cultural competence at Metro.

Several specific items in the committee membership and public involvement core area advance equity. The following strategy is a part of the committee membership and public involvement section: "When policies and programs are developed or revised, diversity and equity considerations will be integrated

into the process.” Also, one goal in this core area is focused on ensuring that Metro committees reflect the diversity of our region’s communities and the plan includes actions and strategies to build communities’ capacity to participate and to improve public outreach to different communities who have often not participated in Metro issues and decision-making processes.

**Why |** Metro Council approved the convening of the Diversity Action Team at the request of the chief operating officer (COO). The team has been operating since 2005 at the direction of the Chief Operating Officer and in 2010 the team took an active interest in updating the plan, making it more substantive to ensure that it provided concrete measureable actions that Metro could take to address diversity.

**How |** This plan does not quantify equity considerations but provides direction to ensure equity considerations are addressed when policies or programs are revised or developed. The aspect of the plan addressing committee membership aims to provide a number of committee members who are from diverse communities and thus participating in Metro’s decision making processes. Also, tracking is suggested to measure the number of diverse community members Metro reaches out to, however that measurement tool is yet to be developed.

Suggested indicators for activities listed above are:

- Number of culturally specific organizations engaged by Metro that represent the needs of underrepresented communities in the region.
- Demographic composition of people participating in public involvement activities per category according to gender, age group, minority group membership, and other indicators of diversity.
- Percentage of participants who think that Metro is effective in engaging diverse and historically underserved communities and meeting their stated needs, as compared with previous years. (requires survey)
- Demographics of committee applicant pool as compared with demographics of the region, including historically underserved populations.
- Demographics of committee members as compared with demographics of the region, including historically underserved populations.

Another aspect of the plan measures contracts awarded to MWESB contractors and is described in a previous section. Additionally, the other focus areas of the plan specifically address issues of diversity and cultural competence of Metro staff. Having a diverse and culturally competent staff will greatly enhance any work that Metro does to specifically advance issues of equity in our programs and policies.

Key to achieving the goals laid out in the Diversity Action Plan is the hiring of a Diversity Program Manager. Among the many responsibilities of this position is to track the progress towards the goals outlined in the Diversity Action Plan. Without this level of accountability, it is likely that progress on this plan would be slow and not have the support of the whole agency. This position reports to the Chief Operating Officer, indicating the important message being sent to agency staff that Metro must address its shortcomings as they related to diversity and inclusiveness from both in its internal and external work.

**Moving forward |** The plan is still in draft form and will be reviewed by outside stakeholders in 2012. It will be approved by the Metro Council. The revised plan now specifies that the Diversity Program Manager will review implementation of the plan on a quarterly basis and report to the SLT and DAT.

## Community Investment Initiative

The Community Investment Initiative (CII) is a collaborative approach to addressing the region's infrastructure needs through innovative resources and an ongoing commitment to reducing inefficiencies. CII is a Metro-facilitated but independent group of community and business leaders looking at strategies for economic growth. This approach will focus on the development of an integrated investment strategy that weaves together public and private resources to help close the gap between the region's needs and its financial means. This strategy will maintain existing public structures and community assets, look for efficiencies that come with a regional approach, and target new investments to accommodate long-term population growth, spur innovation and generate jobs. By focusing on investments in downtowns, main streets and industrial and employment areas, an investment strategy can move us closer to a shared vision for the region.

**What |** The work of the CII is divided into 4 work groups charged with developing specific solutions to the region's transportation, investment, human capital, and land readiness challenges. Two additional groups were formed to focus on outreach and equity. The equity work group includes representatives from the Leadership Council as well as content experts from the community. The equity work group is staffed by Metro. The work group is charged with developing a definition of equity and assisting the other CII work groups to operationalize equity in their various strategies. The equity work group was formed in September 2011.

**Why |** There was recognition among CII members and staff that the CII would best serve the region if the CII Leadership Council was representative of the region's population and that the CII would find a deeper pool of support for ideas that benefit the entire region. There was also recognition that the CII, as a Metro partner, should be cognizant of the six desired outcomes and triple bottom line metrics, which both include equity components.

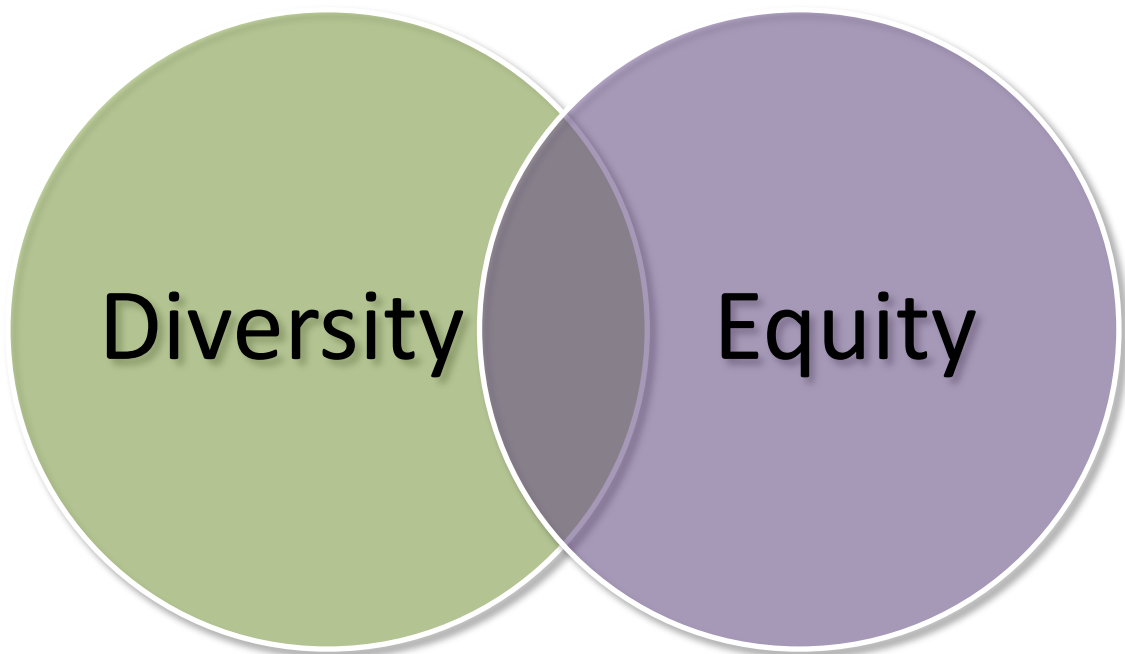
**How |** An equity framework is in development that currently contains ten questions that specifically asks how equity is being considered in the various projects being developed by the four workgroups made up of Leadership Council members. Workgroup members will use this framework, with assistance and guidance from the equity work group, to help integrate equity into their specific projects and policy proposals. The idea is that this worksheet can be used for a range of projects, programs, and policies that may be developed out of CII. It is expected that the framework will evolve as the equity group gets feedback from the other work groups and as the direction of CII work becomes more focused.

**Moving forward |** The work coming out of the equity work group represents important work that Metro staff can build upon. The framework can be modified for use on Metro projects and policies. In addition, the Leadership Council represents important stakeholders to Metro. The development and discussion of this framework with these stakeholders is an important step in helping Metro further define how it should advance equity. In addition, the Metro Council will be kept apprised of the use of this framework. This will help inform continued policy level discussions around equity.

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## Diversity and Equity support one another, but there are differences:

- **Diversity** is about openness to acknowledging and accepting differences in attitudes, perceptions, and behaviors.
- **Diversity** is about relationships, it's about interacting with people (internally and externally) who are different from you and doing it in a way that is respectful.
- **Diversity** is about creating an inclusive environment where all individuals can achieve their highest potential.
- **Diversity** ensures that people who are part of the organization feel their views, input and suggestions are valued and taken into account appropriately.
- **Diversity** is about valuing difference between individuals and groups of people.
- **Diversity** welcomes and celebrates these differences rather than trying to get rid of them.
  
- **Equity** is the means to healthy communities and an end that benefits us all.
- **Equity** is about addressing historical inequities.
- **Equity** requires the intentional examination of systemic policies that appear to be fair, but perpetuate disparities.
- **Equity** requires the identification of the barriers to fair practices.
- **Equity** ensures that all communities can shape their own present and future and achieve their full potential.



# Phase 1: Metro Equity Inventory

Nuin-Tara Key

Metro Council Retreat

Tuesday, June 5, 2012



Metro | *Making a great place*



# Presentation Outline

- 1 | Review project approach (3 phases)
- 2 | Phase 1 overview
- 3 | Terms and concepts
- 4 | Equity Inventory overview
- 5 | Phase 1 findings
- 6 | What others are doing
- 7 | Staff recommendations

# Presentation Outcomes

## Council understanding of:

- Current equity related efforts at Metro
- Report findings and recommendations
- Proposed recommendations

# Project problem statement

*Metro lacks a consistent approach to advancing equity considerations*

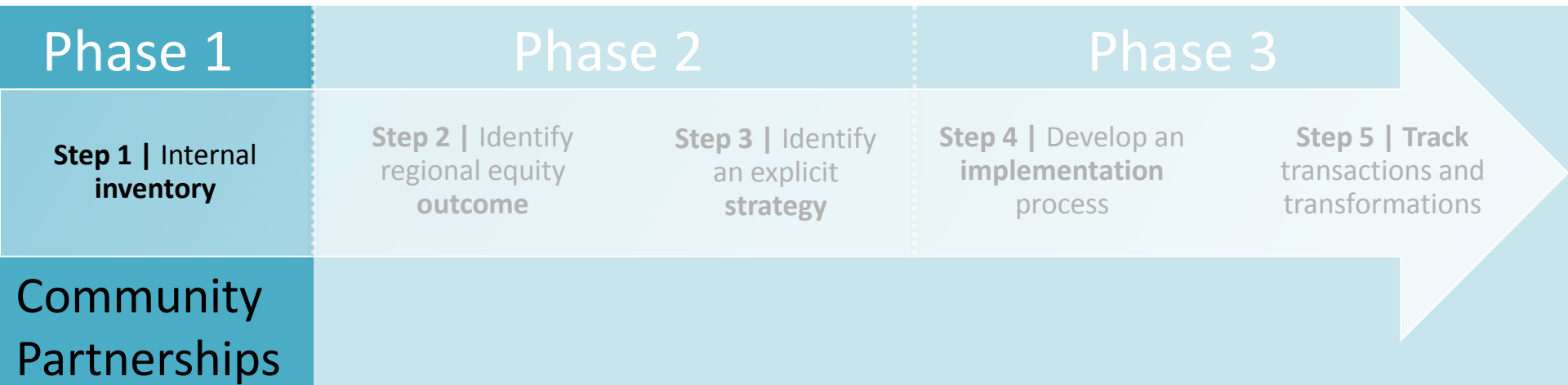
- What metrics (race, ethnicity, income, other)?
- What scale?
- How do we prioritize various issues?
- Timing?
- Communication/outreach?

# Agency-wide challenges

- Inefficiencies with duplicative staff efforts throughout the agency
- Limited effectiveness in achieving Metro values
- No system to guarantee equity is included in all projects
- No method to ensure consistent review

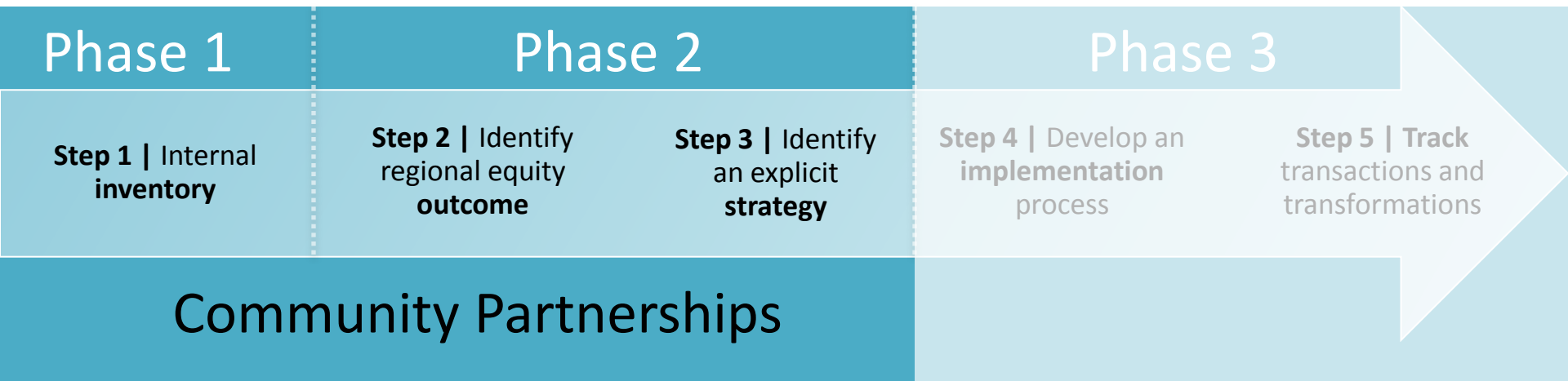
# 3 Phase approach...

## ➤ Phase 1 | Metro Equity Inventory Report



# ...3 Phase approach...

- Phase 1 | Metro Equity Inventory Report
- *Proposed* Phase 2 | Define a strategy through community engagement



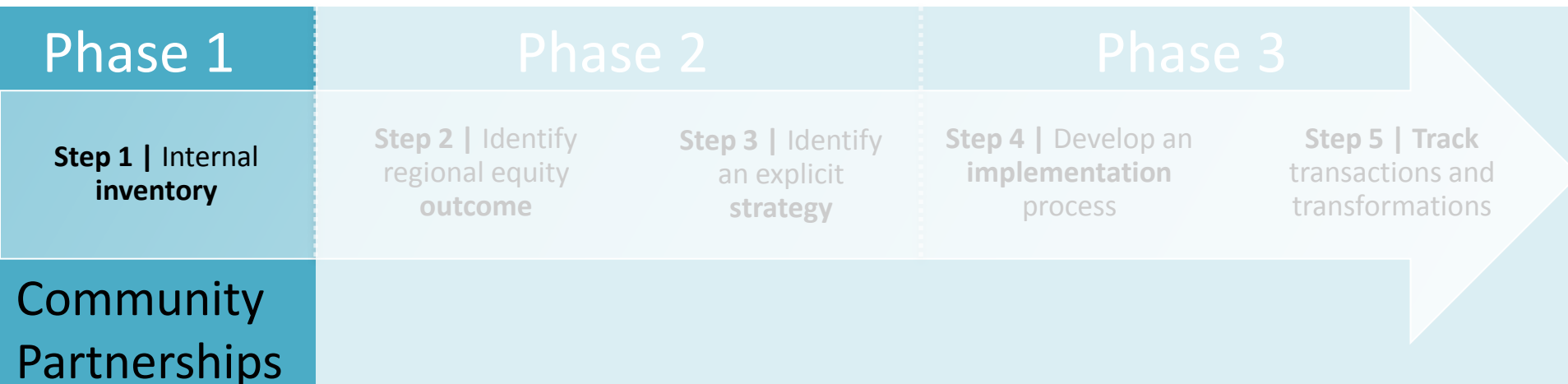
# ...3 Phase approach

- Phase 1 | Metro Equity Inventory Report
- *Proposed* Phase 2 | Define a strategy through community engagement
- *Proposed* Phase 3 | Implement a strategy



# Phase 1 inventory overview

- Cross departmental interviews (identified staff previously or currently incorporating equity considerations)
- Research external equity efforts
- External review and feedback on report



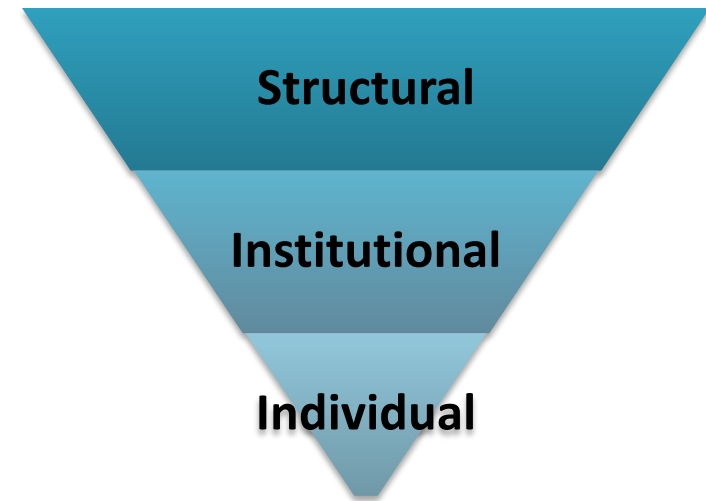


# Phase 1 desired outcomes

- Develop common understanding of current effort to advance equity
- Summarize agency-wide findings
- Identify preliminary agency-wide recommendations
- Provide foundation for *proposed* phases 2 & 3
- Provide clear and consistent information to Metro Council

# Terms and concepts

- **Organizational model**  
Structural equity framework
- **Diversity and equity**



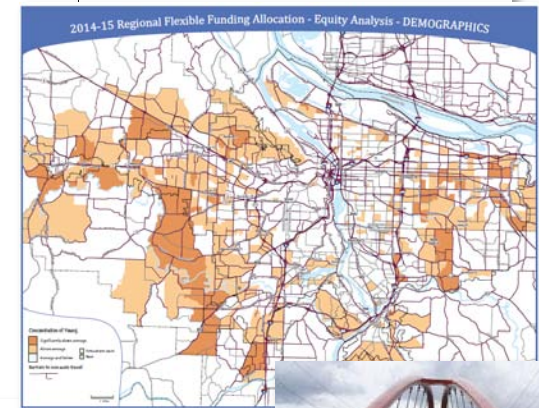
# Equity Inventory: Metro activities

- Planning and Development
- Sustainability Center
- Parks and Environmental Services
- Visitor Venues
- Research Center
- Agency-wide
- Community Investment Initiative



# Equity Inventory: Promising practices

- **Guiding documents**  
RCR Strategic Action Plan /RTP
- **Engagement**  
Regional Flexible Funds
- **Analytical practices**  
Opportunity mapping
- **Grant program**  
Regional Travel Options
- **Hiring practices**  
First Opportunity Target Area



# Equity Inventory: Inconsistencies

## ➤ Definition

First Opportunity Target Area & Hazardous Waste Roundups

## ➤ Accountability

MWESB program support

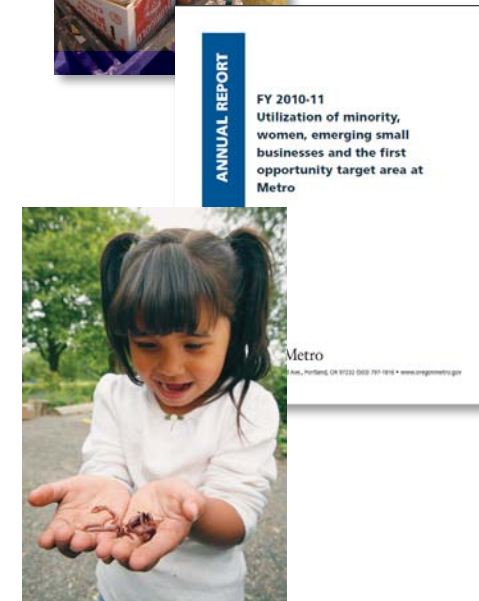
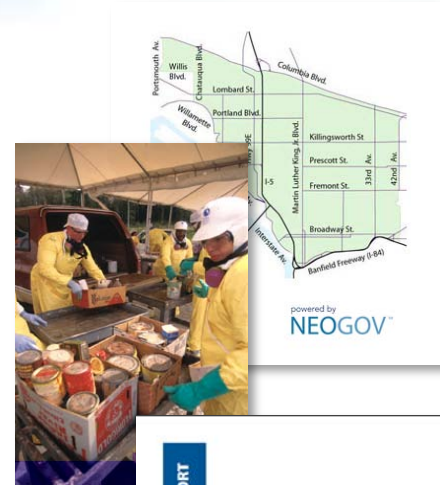
## ➤ Demographic analysis and surveys

Toxics Reduction program

Oregon Zoo attendance survey

## ➤ Engagement and communication

Discrepancy between ongoing decision making and discrete project input



# Phase 1 Findings

- Barriers
- Limitations
- Implementation considerations
- Role of leadership
- Opportunities moving forward

## Overarching finding

*Metro lacks a consistent strategy to address equity considerations*

# Questions?

# What others are doing

Multnomah County  
**Office of Diversity and Equity**

**Multnomah County**

Health Equity Initiative – 2007

Office of Diversity and Equity – 2010

Office Of  
**EQUITY AND HUMAN RIGHTS**  
*Realizing Equity. Enhancing the City of Portland.*

**City of Portland**

Office of Equity and Human Rights – 2011



**Portland Public Schools**

Racial Education Equity Policy - 2011



# What others are doing



## King County, WA

### Equity and Social Justice - 2010



## City of Seattle, WA

### Race and Social Justice Initiative - 2005

# Questions?

# Staff recommendations

- **Support *proposed* Phase 2**
  - Define a process for the development of an agency-wide strategy
  - Focus desired outcome on equity to create actionable goal
  - Identify institutional and structural challenges

# Questions?

**Thank you!**

# External Research

- Center for Diversity and the Environment
- City of Portland – BPS– Portland Plan
- City of Portland – Office of Equity (In Development)
- Coalition for a Livable Future
- Coalition of Gresham Neighborhoods
- El Programa (Sponsored by Catholic Charities)
- Human Solutions, Inc.
- King’s County, Washington
- Multnomah County, Oregon – Health Department
- People for Parks
- Portland Development Commission
- Upstream Public Health

# Next Steps and discussion

- Commitment from SLT to operationalize regional equity
- SLT support for recommendations to Council
- Strategy recommendation around racial equity

# Phase 1 Recommendations

- Invest in developing a strategy to define Metro's role in addressing regional equity
- The Strategy should:
  - Guarantee that Metro leadership and staff consider equity at the beginning phase of program, policy and project development
  - Ensure equity considerations become actionable by staff
  - Ensure equity is measurable during evaluation process
  - Define the outcomes we are working towards



# Initial steps to develop a strategy:

- Define the focus of a strategy
- Identify institutional and structural challenges
- Recognize the need for internal and external strategies
- Given fiscal realities and constraints, identify how current resources can be allocated differently
- Work to build the infrastructure needed to support a strategy moving forward

# Phase 1 Recommendations

## Strategy recommendation

Metro's strategy should focus on addressing racial dimensions of equity or institutional racism