

Metro | Agenda

Meeting: Equity Strategy Advisory Committee
Date: Wednesday, Sept. 24, 2014
Time: 3:00 to 5:00 p.m.
Place: Metro Regional Center, room 270

3 p.m. **Welcome, Agenda & Minutes Review**
Carl Talton (5 mins)

- Approval of August minutes

3:10 p.m. **Program Updates**
Pietro Ferrari (5 mins)

- Critical milestones

Introducing Diversity, Equity and Inclusion coordination, *Scott Robinson (15 mins)*

- Q&A

3:30 p.m. **Survey results Pietro (15 mins.)**

3:45 p.m. **Discussion on draft indicators (45 mins.)**
Juan Carlos Ocaña-Chú

- Review indicators
- Present and discuss matrix on Metro's roles and level of authority
- Q&A & discussion

4:30 p.m. **Other:**

- Overview of other Metro initiatives related to equity (remaining time)
Patty Unfred
- Next meeting: Oct. 20

MAKING A
GREAT
PLACE



Equity Strategy Advisory Committee (ESAC)

Summary Results of Expert
Comments on Equity Indicators

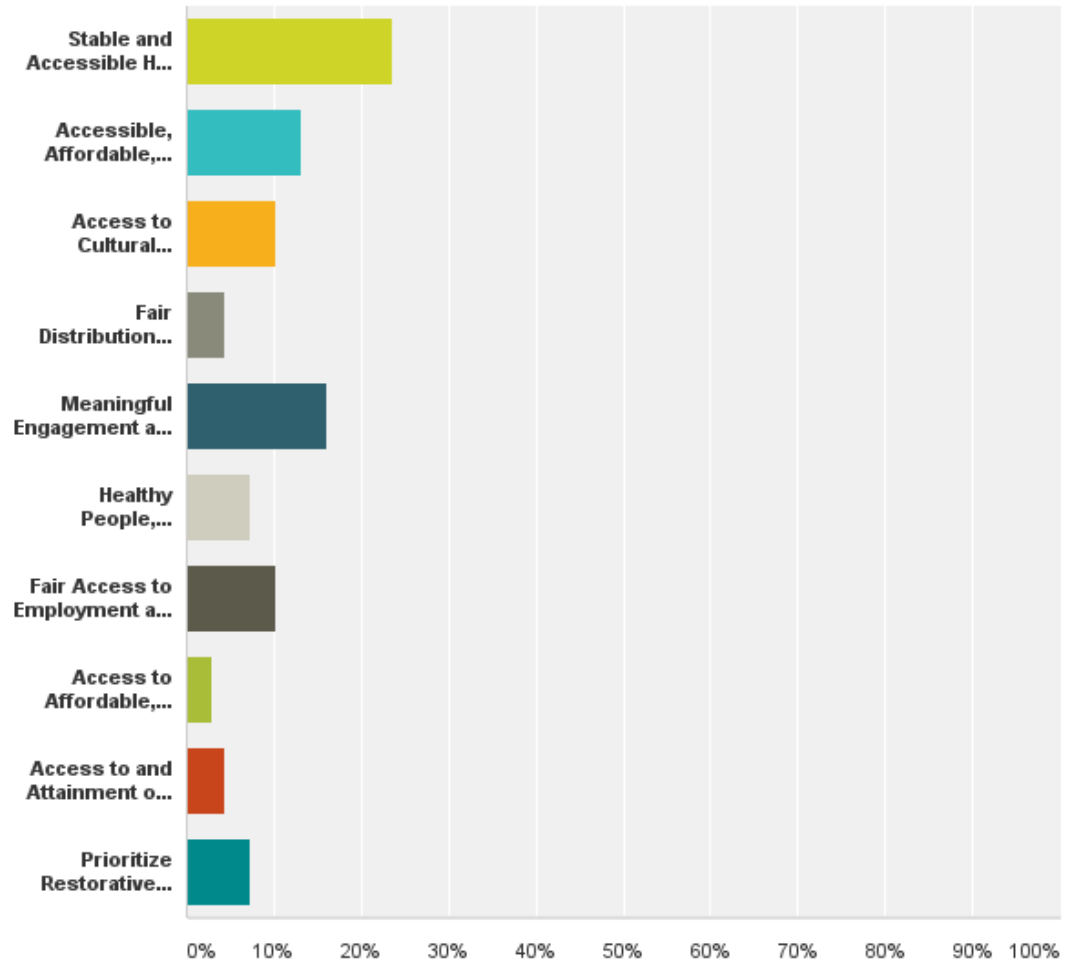
September 24, 2014

Summary

- 68 total responses (50 individuals) collected from Aug. 22 – Sept. 14
- 41 open-text responses on Metro's role in advancing equity in the region.

Q2 Please select an equity indicator to comment on.

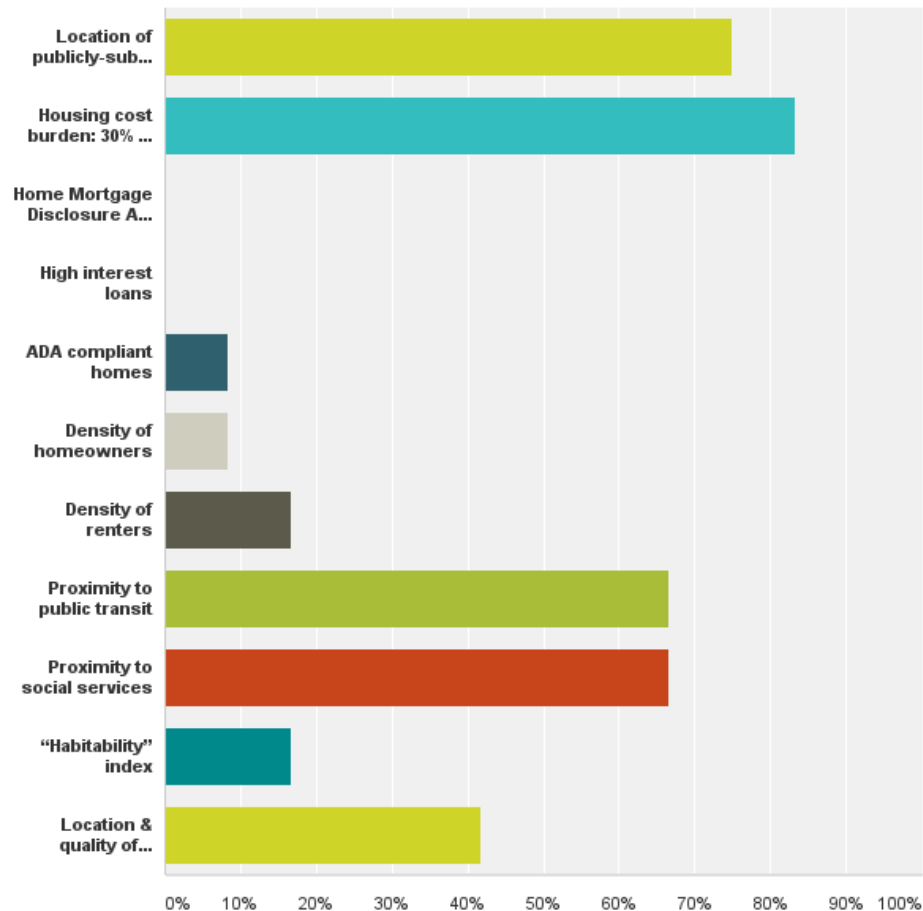
Answered: 68 Skipped: 0



Stable and Accessible High Quality Housing Choices (12)

Q3 For [Q2], which datasets do you currently use? Select all that apply.

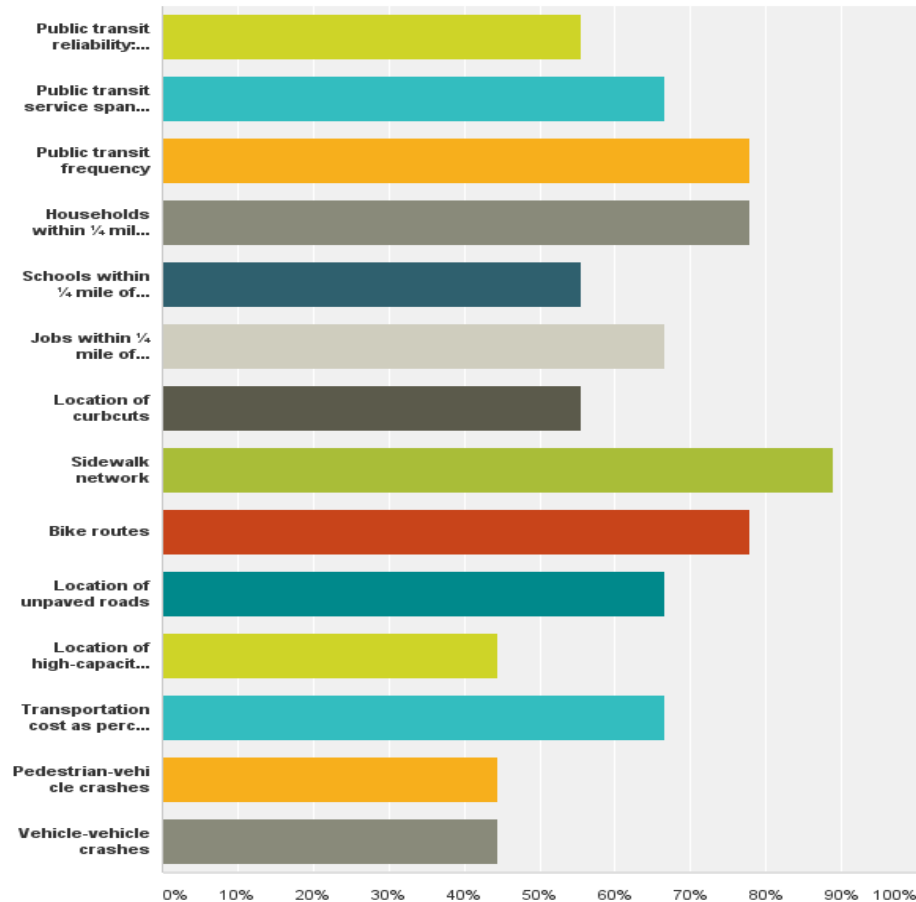
Answered: 12 Skipped: 56



Accessible, Affordable, Effective, and Safe Transportation Options (9)

Q6 For [Q2], which datasets do you currently use? Select all that apply.

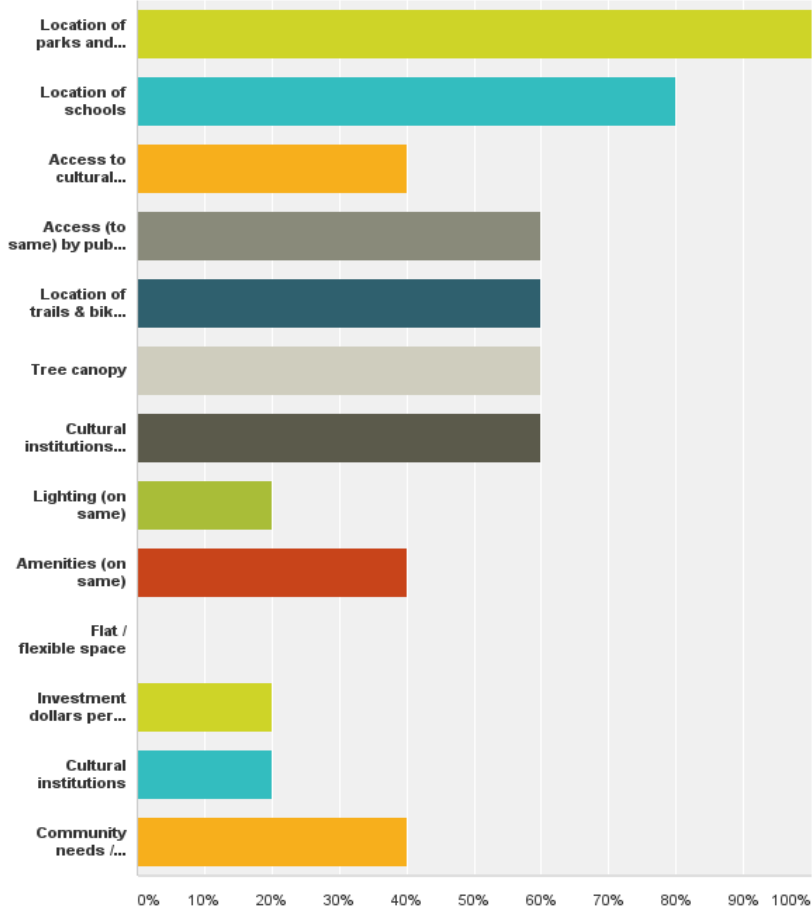
Answered: 9 Skipped: 59



Access to Cultural Institutions, Parks & Natural Space (5)

Q9 For [Q2], which datasets do you currently use? Select all that apply.

Answered: 5 Skipped: 63



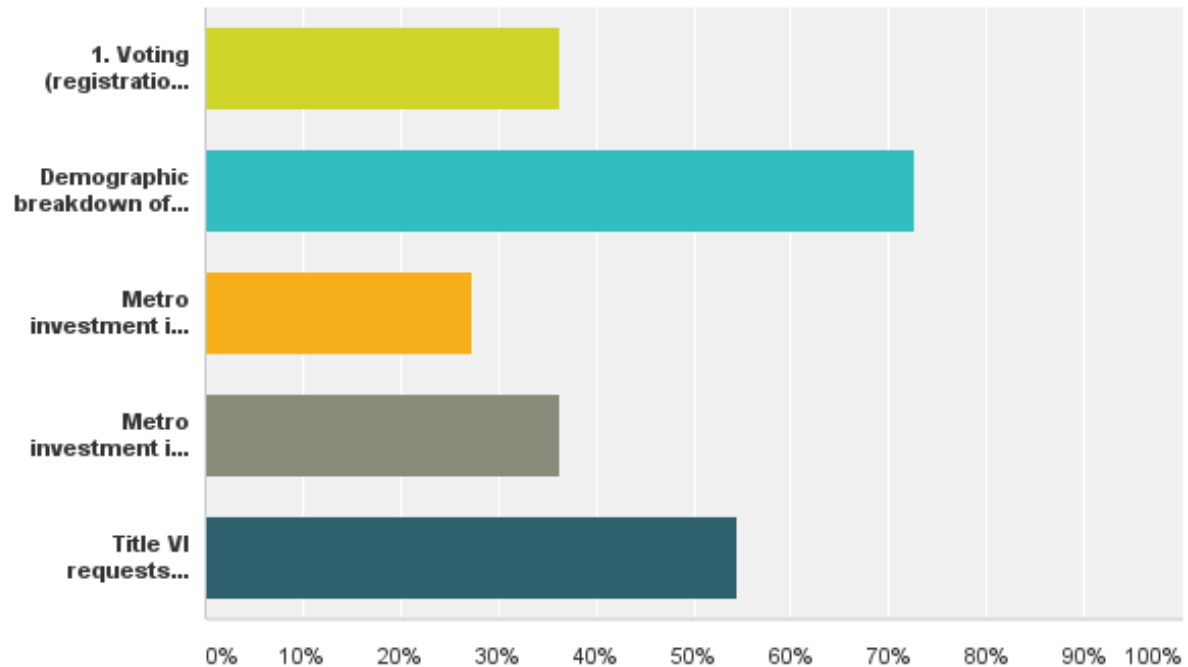
Fair Distribution of Environmental Burdens

No responses submitted

Meaningful Engagement and Empowered Communities (11)

Q15 For [Q2], which datasets do you currently use? Select all that apply.

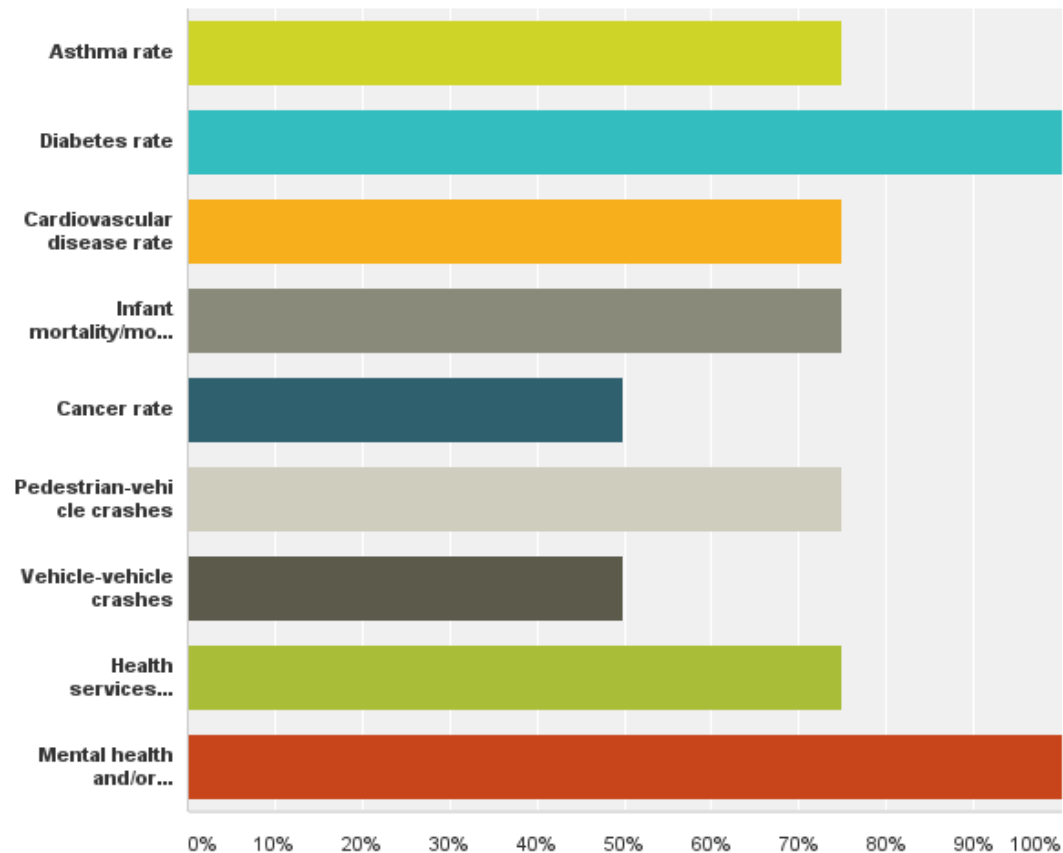
Answered: 11 Skipped: 57



Healthy People, Families, and Communities (4)

Q18 For [Q2], which datasets do you currently use? Select all that apply.

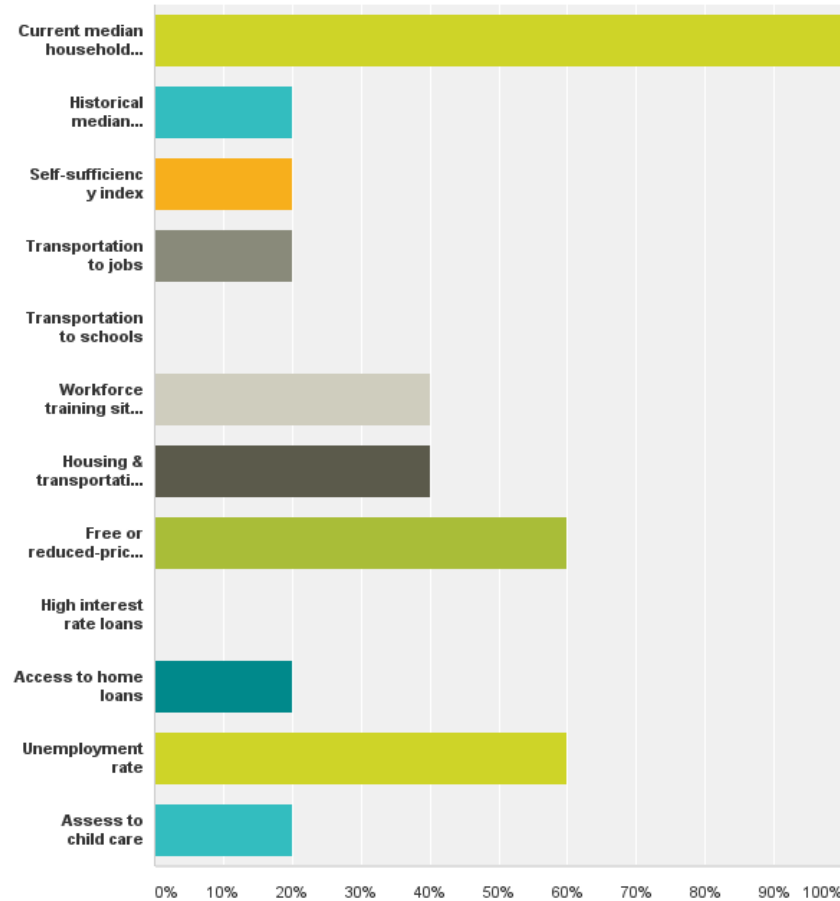
Answered: 4 Skipped: 64



Fair Access to Employment and Economic Prosperity (5)

Q21 For [Q2], which datasets do you currently use? Select all that apply.

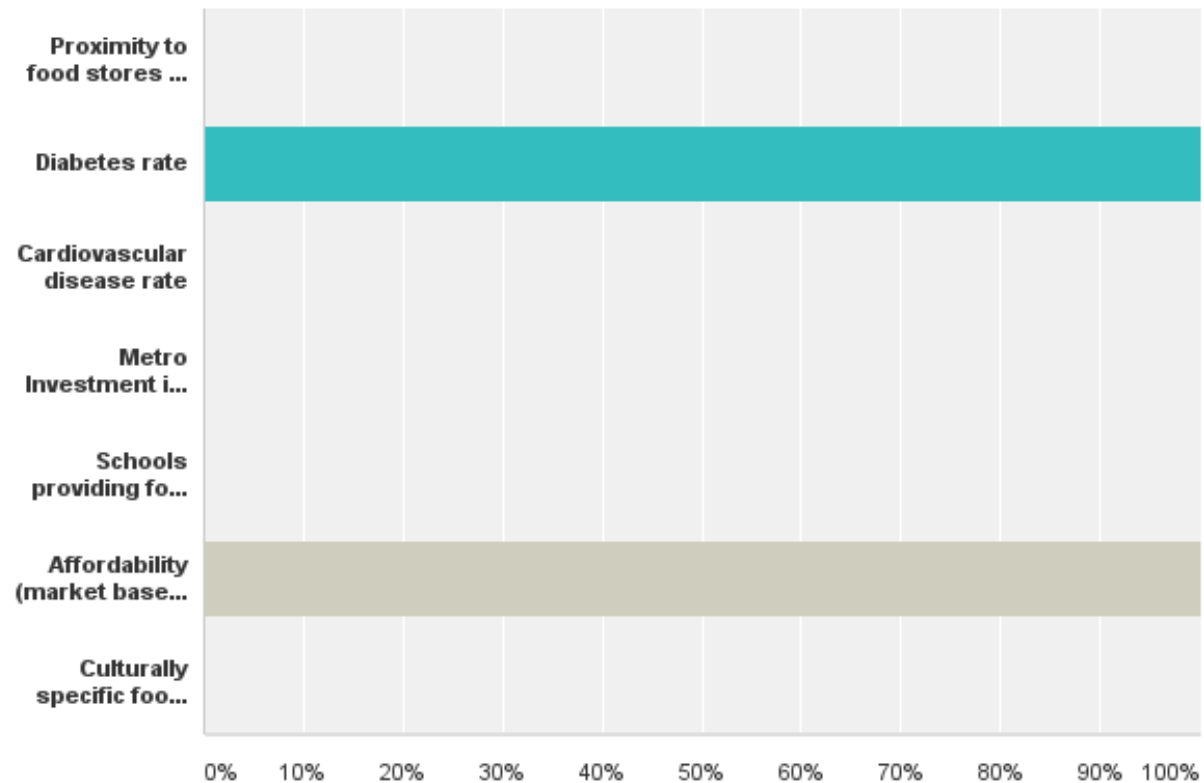
Answered: 5 Skipped: 63



Access to Affordable, Nutritious, and Culturally Appropriate Foods (1)

Q24 For [Q2], which datasets do you currently use? Select all that apply.

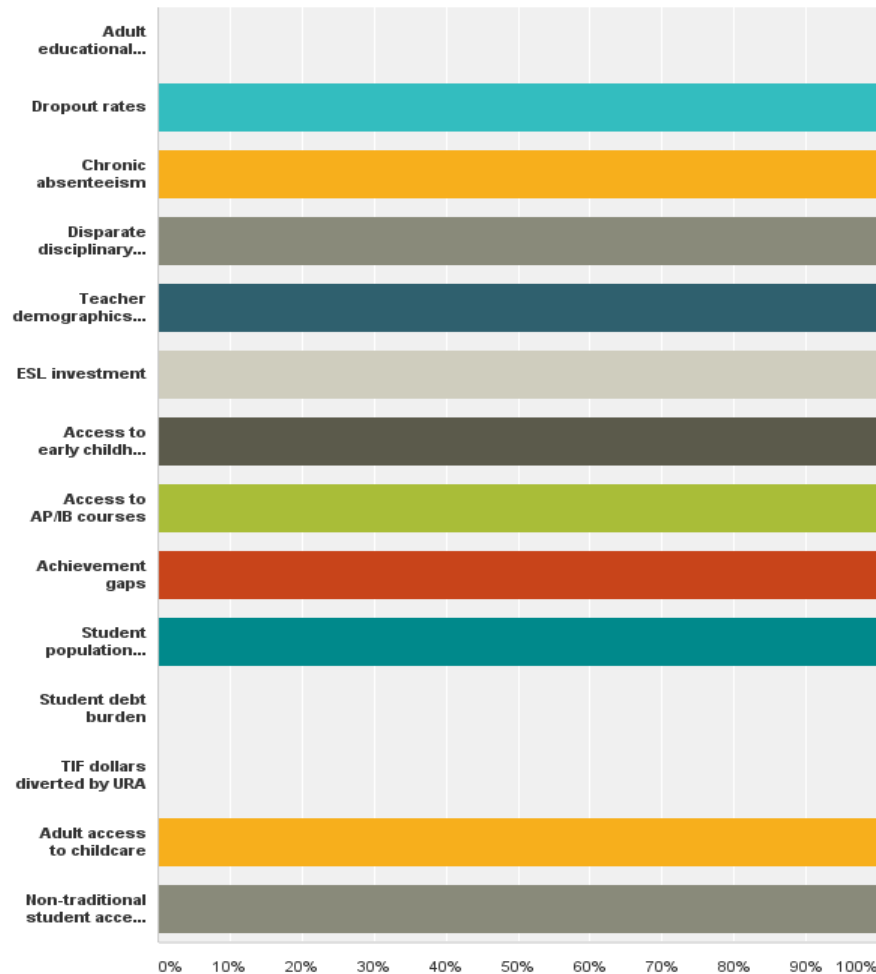
Answered: 1 Skipped: 67



Access to and Attainment of Quality Education (1)

Q27 For [Q2], which datasets do you currently use? Select all that apply.

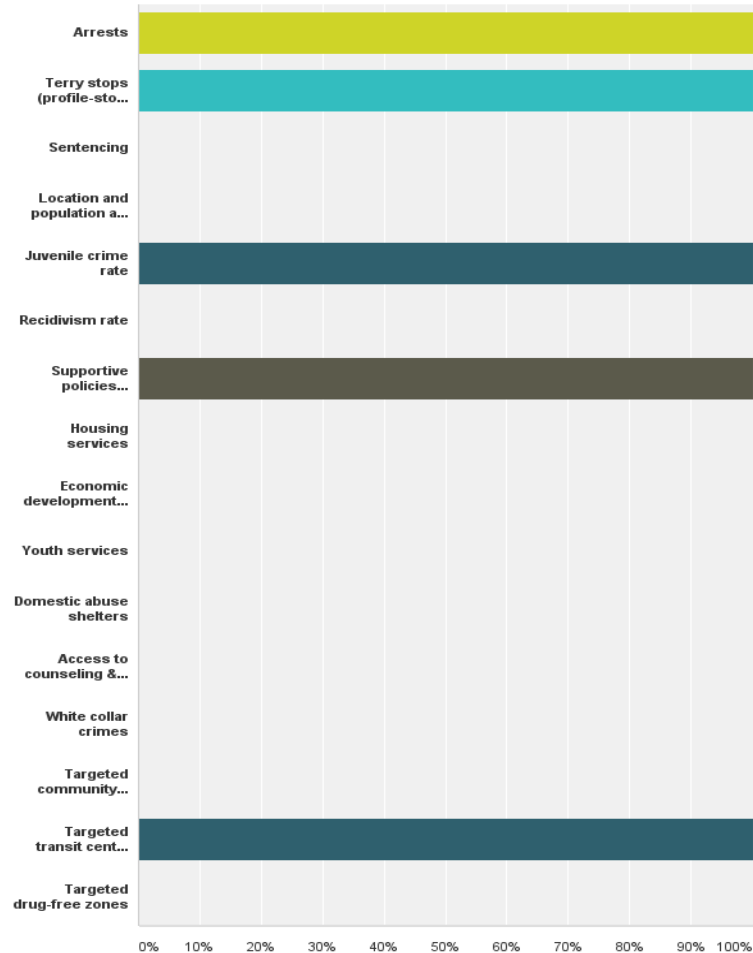
Answered: 1 Skipped: 67



Prioritize Restorative Justice and Survivor/Victim Support (1)

Q30 For [Q2], which datasets do you currently use? Select all that apply.

Answered: 1 Skipped: 54



References: Indicator definitions

Stable and Accessible High Quality Housing Choices

People should have affordable and quality housing options that are accessible for persons with disabilities and those without a car. Our region must provide a diversity of housing options that ensure mixed income communities so that all households can live near where they work, play, pray, and are not displaced by future investments in housing and other developments.

- Location of publicly-subsidized affordable housing
- Housing cost burden: 30% or more of income on housing and utilities
- Home Mortgage Disclosure Act (HMDA)
- High interest loans
- ADA compliant homes
- Density of homeowners
- Density of renters
- Proximity to public transit
- Proximity to social services
- “Habitability” index
- Location & quality of “accidental/incidental” affordable housing (in addition to intentional/publicly-subsidized housing)

Accessible, Affordable, Effective, and Safe Transportation Options

Our region must ensure a variety of transportation options for low and no car households that are close to where people who most need these options live, are ADA compliant, reliable/frequent, and affordable. All transportation options must be supported by appropriate infrastructure to ensure they can be safely accessed and used. Our transportation network should effectively connect people to where they live, work, play, and pray.

- Public transit reliability: Percent on-time
- Public transit service span: Days/time
- Public transit frequency
- Households within $\frac{1}{4}$ mile of frequent public transit service
- Schools within $\frac{1}{4}$ mile of frequent public transit service
- Jobs within $\frac{1}{4}$ mile of frequent public transit service
- Location of curb-cuts
- Sidewalk network
- Bike routes
- Location of unpaved roads
- Location of high-capacity roads / arterials
- Transportation cost as percent of income
- Pedestrian-vehicle crashes
- Vehicle-vehicle crashes

Access to Cultural Institutions, Parks & Natural Space

Communities should have equal access to well-maintained and developed parks and recreation programs, community gardens, and natural spaces that safely serve the community in a culturally appropriate manner. Communities should have equal access to publically supported cultural institutions such as art museums and programs, music programs, and performance spaces.

- Location of parks and natural Areas/green space
- Location of schools
- Access to cultural institutions, parks, natural space by sidewalk
- Access (to same) by public transit
- Location of trails & bike lanes
- Tree canopy
- Cultural institutions, parks, natural spaces developed for public use
- Lighting (on same)
- Amenities (on same)
- Flat / flexible space
- Investment dollars per square mile
- Cultural institutions
- Community needs / satisfaction

Fair Distribution of Environmental Burdens

Communities that are disproportionately burdened by environmental pollution and other undesirable land uses should be prioritized for mitigation/remediation of these burdens. Decision-makers must inform and meaningfully engage communities most impacted by these burdens when considering when and how to act. Historical, current and future environmental harms should be ameliorated or avoided to the greatest degree possible.

- Location of brownfields
- Public investment in brownfield amelioration
- Location of superfund sites
- Solid waste treatment / storage facilities
- Asthma rates
- Air quality monitoring
- Toxin transport
- Public investment in lead abatement
- Public investment in environmental education


Meaningful Engagement and Empowered Communities

Civic engagement goes beyond voter registration and turnout by empowering historically under represented communities to more meaningfully influence policy outcomes. Governmental institutions must provide meaningful access to the decision making process that is early and often enough to determine outcomes; transparent; and made assessable by providing multi-lingual support and technical support on complex issues, conducting meetings at times of the day most convenient for community members, and providing childcare.

- Voting (registration and turnout)
- Demographic breakdown of elected officials, city employees, subcommittees, and advisory committees
- Metro investment in direct capacity building and technological support
- Metro investment in community outreach
- Title VI requests (particularly LEP/language translation)


Healthy People, Families, and Communities

While individual choice plays a role in public health, the economy, environment, and social status are the major determinants of health and should be the focus of regional decision-makers. Everyone should be able to achieve good health that is reasonable for them and at a cost that they can afford.

- Asthma rate
 - Diabetes rate
 - Cardiovascular disease rate
 - Cancer rate
 - Infant mortality/morbidity/low birth-weight rate
 - Pedestrian-vehicle crashes
 - Vehicle-vehicle crashes
 - Health services provided in culturally appropriate way
 - Mental health and/or addiction
- 


Fair Access to Employment and Economic Prosperity

Our regional economy should provide support for small business, job training for individuals, and provide living wages that promote human dignity, prosperity, and wealth accumulation for those who currently lack financial security.

- Current median household income
 - Historical median household income
 - Self-sufficiency index
 - Transportation to jobs
 - Transportation to schools
 - Workforce training sites and employment-related services
 - Housing & transportation cost burden
 - Free or reduced-price lunch students
 - High interest rate loans
 - Access to home loans
 - Unemployment rate
 - Assess to child care
- 

Access to Affordable, Nutritious, and Culturally Appropriate Foods

Communities should have access to healthy, affordable, and culturally appropriate foods with institutional support to properly educate community members about nutrition and cultural food traditions. Our region should make “the healthy choice is the easy choice.”

- Proximity to food stores and farmers’ markets accepting SNAP
 - Diabetes rate
 - Cardiovascular disease rate
 - Metro Investment in food education programs
 - Schools providing food education
 - Affordability (market based survey)
 - Culturally specific food stores
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Access to and Attainment of Quality Education

Our region must improve education outcomes, quality, and access by closing achievement gaps, dropout rates, chronic absenteeism, and access to special programs. Youth must be able to safely and efficiently get to and from school. Students should be properly supported to achieve academic success and their economic opportunities should not be limited by educational debt.

- Adult educational attainment
- Dropout rates
- Chronic absenteeism
- Disparate disciplinary rates
- Teacher demographics & retention / recruitment efforts
- ESL investment
- Access to early childhood education
- Access to AP/IB courses
- Achievement gaps
- Student population stability / displacement
- Student debt burden
- TIF dollars diverted by URA
- Adult access to childcare
- Non-traditional student access to childcare

Prioritize Restorative Justice and Survivor/Victim Support

Community Justice broadly refers to all variants of crime prevention and justice activities that explicitly include the community in their processes and set the enhancement of community quality of life as a goal. Recent initiatives include community crime prevention, community policing, community defense, community prosecution, community courts, and restorative justice sanctioning systems. Approaches share a common core in that they address community-level outcomes by focusing on short and long-term problem solving, restoring and supporting victims and communities, strengthening normative standards, and effectively reintegrating offenders.

- Arrests
- *Terry* stops (profile-stop-and-frisk)
- Sentencing
- Location and population at correctional facilities
- Juvenile crime rate
- Recidivism rate
- Supportive policies (example: Ban the Box)
- Housing services
- Economic development services
- Youth services
- Domestic abuse shelters
- Access to counseling & other support
- White collar crimes
- Targeted community enforcement areas
- Targeted transit center enforcement areas
- Targeted drug-free zones

Metro - Roles, responsibilities and accountability as related to the Equity Baseline Indicators - Draft Sept. 22, 2014

Indicator (List all indicators in this column)	Indicator	Desired outcome (connect to one of the 6 desired regional outcomes)	Data (easy, medium or Hard/Unknown to get data?)	Priority (H, M, L priority for community)	Metro authority/control (H, M, L)
Stable and Accessible High Quality Housing Choices <i>People should have affordable and quality housing options that are accessible for persons with disabilities and those without a car. Our region must provide a diversity of housing options that ensure mixed income communities so that all households can live near where they work, play, pray, and are not displaced by future investments in housing and other developments.</i>	Location of publicly-subsidized affordable housing	VC & Econ	Easy (Equity Atlas)		M
Stable and Accessible High Quality Housing Choices	Housing cost burden: 30% or more of income on housing and utilities	VC & Econ	Easy (Equity Atlas)		L
Stable and Accessible High Quality Housing Choices	Home Mortgage Disclosure Act (HMDA) - loan applications and denials (DUPLICATE OF ROW 69?)	VC & Econ	Easy (Equity Atlas)		L
Stable and Accessible High Quality Housing Choices	High interest loans (CONVENTIONAL LOANS? DUPLICATE OF ROW 68?)	VC & Econ	Easy (Equity Atlas)		L
Stable and Accessible High Quality Housing Choices	ADA compliant homes	VC & Econ	Easy (Equity Atlas)		L
Stable and Accessible High Quality Housing Choices	Density of homeowners	VC & Econ	Easy (Equity Atlas)		M
Stable and Accessible High Quality Housing Choices	Density of renters (DENSITY OF HOUSING?)	VC & Econ	Easy (Equity Atlas)		M
Stable and Accessible High Quality Housing Choices	Proximity to public transit	VC & Econ	Easy (Equity Atlas)		H
Stable and Accessible High Quality Housing Choices	Proximity to social services	VC & Econ	Easy (Equity Atlas)		L
Stable and Accessible High Quality Housing Choices	"Habitability" index	VC & Econ	Hard/Unknown		L
Stable and Accessible High Quality Housing Choices	Location & quality of "accidental/incidental" affordable housing (in addition to intentional/publicly-subsidized housing)	VC & Econ	Hard/Unknown		L
Accessible, Affordable, Effective, and Safe Transportation Options <i>Our region must ensure a variety of transportation options for low and no car households that are close to where people who most need these options live, are ADA compliant, reliable/frequent, and affordable. All transportation options must be supported by appropriate infrastructure to ensure they can be safely accessed and used. Our transportation network should effectively connect people to where they live, work, play, and pray.</i>	Public transit reliability: Percent on-time	Trans	Medium		L
Accessible, Affordable, Effective, and Safe Transportation Options	Public transit service span: Days/time	Trans	Medium		L

Indicator (List all indicators in this column)	Indicator	Desired outcome (connect to one of the 6 desired regional outcomes)	Data (easy, medium or Hard/Unknown to get data?)	Priority (H, M, L priority for community)	Metro authority/control (H, M, L)
Accessible, Affordable, Effective, and Safe Transportation Options	Public transit frequency	Trans	Medium		L
Accessible, Affordable, Effective, and Safe Transportation Options	Households within ¼ mile of frequent public transit service	Trans	Medium		M
Accessible, Affordable, Effective, and Safe Transportation Options	Schools within ¼ mile of frequent public transit service	Trans	Medium		M
Accessible, Affordable, Effective, and Safe Transportation Options	Jobs within ¼ mile of frequent public transit service	Trans	Medium		M
Accessible, Affordable, Effective, and Safe Transportation Options	Location of (TRANSIT STOP) curbcuts	Trans	Easy (Equity Atlas)		L
Accessible, Affordable, Effective, and Safe Transportation Options	Sidewalk network	Trans	Hard/Unknown for regionally complete analysis		M
Accessible, Affordable, Effective, and Safe Transportation Options	Bike routes	Trans	Easy		H
Accessible, Affordable, Effective, and Safe Transportation Options	Location of unpaved roads	Trans	Hard/Unknown		L
Accessible, Affordable, Effective, and Safe Transportation Options	Location of high-capacity roads / arterials	Trans	Easy		H
Accessible, Affordable, Effective, and Safe Transportation Options	Transportation cost as percent of income	Trans	Easy (Equity Atlas)		M
Accessible, Affordable, Effective, and Safe Transportation Options	Pedestrian-vehicle crashes	Trans	Easy (Equity Atlas)		M
Accessible, Affordable, Effective, and Safe Transportation Options	Vehicle-vehicle crashes	Trans	Easy (Equity Atlas)		M

Indicator (<i>List all indicators in this column</i>)	Indicator	Desired outcome (<i>connect to one of the 6 desired regional outcomes</i>)	Data (easy, medium or Hard/Unknown to get data?)	Priority (<i>H, M, L priority for community</i>)	Metro authority/control (<i>H, M, L</i>)
Access to Cultural Institutions, Parks & Natural Space <i>Communities should have equal access to well-maintained and developed parks and recreation programs, community gardens, and natural spaces that safely serve the community in a culturally appropriate manner. Communities should have equal access to publically supported cultural institutions such as art museums and programs, music programs, and performance spaces.</i>	Location of parks and natural Areas/greenspace	VC & CACW	Easy		H
Access to Cultural Institutions, Parks & Natural Space	Location of schools	VC & CACW	Easy		L
Access to Cultural Institutions, Parks & Natural Space	Access to cultural institutions, parks, natural space by sidewalk	VC & CACW	Medium		L
Access to Cultural Institutions, Parks & Natural Space	Access (to same) by public transit	VC & CACW	Medium		M
Access to Cultural Institutions, Parks & Natural Space	Location of trails & bike lanes	VC & CACW	Easy		H
Access to Cultural Institutions, Parks & Natural Space	Tree canopy	VC & CACW	Easy for 2007; Hard/Unknown for current/updates		L
Access to Cultural Institutions, Parks & Natural Space	Cultural institutions, parks, natural spaces developed for public use	VC & CACW	Hard/Unknown		M
Access to Cultural Institutions, Parks & Natural Space	Lighting (on same)	VC & CACW	Hard/Unknown		L
Access to Cultural Institutions, Parks & Natural Space	Amenities (on same)	VC & CACW	Hard/Unknown		L
Access to Cultural Institutions, Parks & Natural Space	Flat / flexible space	VC & CACW	Hard/Unknown		L
Access to Cultural Institutions, Parks & Natural Space	Investment dollars per square mile	VC & CACW	Hard/Unknown		H
Access to Cultural Institutions, Parks & Natural Space	Cultural institutions	VC & CACW	Medium		L
Access to Cultural Institutions, Parks & Natural Space	Community needs / satisfaction	VC & CACW	Hard/Unknown		L
Fair Distribution of Environmental Burdens <i>Communities that are disproportionately burdened by environmental pollution and other undesirable land uses should be prioritized for mitigation/remediation of these burdens. Decision-makers must inform and meaningfully engage communities most impacted by these burdens when considering when and how to act. Historical, current and future environmental harms should be ameliorated or avoided to the greatest degree possible.</i>	Location of brownfields	CACW & CC	Medium		L
Fair Distribution of Environmental Burdens	Public investment in brownfield amelioration	CACW & CC	Hard/Unknown		M
Fair Distribution of Environmental Burdens	Location of superfund sites	CACW & CC	Medium		L
Fair Distribution of Environmental Burdens	Solid waste treatment / storage facilities (NON-SEWER)	CACW & CC	Easy		H
Fair Distribution of Environmental Burdens	Air quality monitoring	CACW & CC	Easy (Equity Atlas)		M
Fair Distribution of Environmental Burdens	Toxin transport	CACW & CC	Hard/Unknown		L
Fair Distribution of Environmental Burdens	Public investment in lead abatement	CACW & CC	Hard/Unknown		L
Fair Distribution of Environmental Burdens	Public investment in environmental education	CACW & CC	Hard/Unknown		M

Indicator (<i>List all indicators in this column</i>)	Indicator	Desired outcome (<i>connect to one of the 6 desired regional outcomes</i>)	Data (easy, medium or Hard/Unknown to get data?)	Priority (<i>H, M, L priority for community</i>)	Metro authority/control (<i>H, M, L</i>)
Meaningful Engagement and Empowered Communities <i>Civic engagement goes beyond voter registration and turnout by empowering historically under represented communities to more meaningfully influence policy outcomes. Governmental institutions must provide meaningful access to the decision making process that is early and often enough to determine outcomes; transparent; and made assessable by providing multi-lingual support and technical support on complex issues, conducting meetings at times of the day most convenient for community members, and providing childcare.</i>	Voting (registration and turnout)	VC	Easy (Equity Atlas)		L
Meaningful Engagement and Empowered Communities	Demographic breakdown of elected officials, city employees, subcommittees, and advisory committees	VC	Hard/Unknown		L
Meaningful Engagement and Empowered Communities	Metro investment in direct capacity building and technological support	VC	Hard/Unknown		H
Meaningful Engagement and Empowered Communities	Metro investment in community outreach	VC	Medium		H
Meaningful Engagement and Empowered Communities	Title VI requests (particularly LEP/language translation)	VC	Hard/Unknown		M
Healthy People, Families, and Communities <i>While individual choice plays a role in public health, the economy, environment, and social status are the major determinants of health and should be the focus of regional decision-makers. Everyone should be able to achieve good health that is reasonable for them and at a cost that they can afford.</i>	Asthma rate	VC & CACW	Easy (Equity Atlas)		M
Healthy People, Families, and Communities	Diabetes rate	VC & CACW	Easy (Equity Atlas)		L
Healthy People, Families, and Communities	Cardiovascular disease rate	VC & CACW	Easy (Equity Atlas)		L
Healthy People, Families, and Communities	Cancer rate	VC & CACW	Medium		L
Healthy People, Families, and Communities	Infant mortality/morbidity/low birth-weight rate	VC & CACW	Easy (Equity Atlas)		L
Healthy People, Families, and Communities	Health services provided in culturally appropriate way	VC & CACW	Hard/Unknown		L
Healthy People, Families, and Communities	Mental health and/or addiction	VC & CACW	Medium		L
Fair Access to Employment and Economic Prosperity <i>Our regional economy should provide support for small business, job training for individuals, and provide living wages that promote human dignity, prosperity, and wealth accumulation for those who currently lack financial security.</i>	Current median household income	ECON	Easy (Equity Atlas)		L
Fair Access to Employment and Economic Prosperity	Historical median household income	ECON	Easy (Equity Atlas)		L

Indicator (List all indicators in this column)	Indicator	Desired outcome (connect to one of the 6 desired regional outcomes)	Data (easy, medium or Hard/Unknown to get data?)	Priority (H, M, L priority for community)	Metro authority/control (H, M, L)
Fair Access to Employment and Economic Prosperity	Self-sufficiency index	ECON	PSU plans to provide		L
Fair Access to Employment and Economic Prosperity	Transportation to jobs	ECON	Easy (Equity Atlas)		M
Fair Access to Employment and Economic Prosperity	Transportation to schools	ECON	Hard/Unknown		M
Fair Access to Employment and Economic Prosperity	Workforce training sites and employment-related services	ECON	Easy (Equity Atlas)		L
Fair Access to Employment and Economic Prosperity	Housing & transportation cost burden	ECON	Easy (Equity Atlas)		L
Fair Access to Employment and Economic Prosperity	Free or reduced-price lunch students	ECON	Easy (Equity Atlas)		L
Fair Access to Employment and Economic Prosperity	High interest rate loans (DUPLICATE)	ECON	Medium		L
Fair Access to Employment and Economic Prosperity	Access to home loans (DUPLICATE OR DISTINCT FROM HMDA MEASURES?)	ECON	Easy (Equity Atlas)		L
Fair Access to Employment and Economic Prosperity	Unemployment rate	ECON	Easy (GPP)		L
Fair Access to Employment and Economic Prosperity	Assess to child care	ECON	Easy (Equity Atlas)		L
Access to Affordable, Nutritious, and Culturally Appropriate Foods <i>Communities should have access to healthy, affordable, and culturally appropriate foods with institutional support to properly educate community members about nutrition and cultural food traditions. Our region should make "the healthy choice is the easy choice."</i>	Proximity to food stores and farmers' markets accepting SNAP	VC	Easy (Equity Atlas)		L
Access to Affordable, Nutritious, and Culturally Appropriate Foods	Metro Investment in food education programs	VC	Medium		L
Access to Affordable, Nutritious, and Culturally Appropriate Foods	Schools providing food education	VC	Hard/Unknown		L
Access to Affordable, Nutritious, and Culturally Appropriate Foods	Affordability (market based survey)	VC	Hard/Unknown (Foodability report; needs update)		L
Access to Affordable, Nutritious, and Culturally Appropriate Foods	Culturally specific food stores	VC	Hard/Unknown (Foodability report; needs update)		L
Access to and Attainment of Quality Education <i>Our region must improve education outcomes, quality, and access by closing achievement gaps, dropout rates, chronic absenteeism, and access to special programs. Youth must be able to safely and efficiently get to and from school. Students should be properly supported to achieve academic success and their economic opportunities should not be limited by educational debt.</i>	Adult educational attainment	VC & ECON	Easy (Equity Atlas)		L
Access to and Attainment of Quality Education	Dropout rates	VC & ECON	Medium		L
Access to and Attainment of Quality Education	Chronic absenteeism	VC & ECON	Medium (State of Black Oregon)		L
Access to and Attainment of Quality Education	Disparate disciplinary rates	VC & ECON	Medium (State of Black Oregon)		L

Indicator (<i>List all indicators in this column</i>)	Indicator	Desired outcome (<i>connect to one of the 6 desired regional outcomes</i>)	Data (easy, medium or Hard/Unknown to get data?)	Priority (<i>H, M, L priority for community</i>)	Metro authority/control (<i>H, M, L</i>)
Access to and Attainment of Quality Education	Teacher demographics & retention / recruitment efforts	VC & ECON	Medium		L
Access to and Attainment of Quality Education	ESL investment	VC & ECON	Medium		L
Access to and Attainment of Quality Education	Access to early childhood education	VC & ECON	Medium		L
Access to and Attainment of Quality Education	Access to AP/IB courses	VC & ECON	Easy (Equity Atlas)		L
Access to and Attainment of Quality Education	Achievement gaps	VC & ECON	Medium		L
Access to and Attainment of Quality Education	Student population stability / displacement	VC & ECON	Hard/Unknown		L
Access to and Attainment of Quality Education	Student debt burden	VC & ECON	Hard/Unknown		L
Access to and Attainment of Quality Education	TIF dollars diverted by URA	VC & ECON	Medium		L
Access to and Attainment of Quality Education	Adult access to child care (DISTINCT FROM ACCESS TO CHILDCARE IN ROW 71?)	VC & ECON	Hard/Unknown/Unknown		L
Access to and Attainment of Quality Education	Non-traditional student access to childcare	VC & ECON	Hard/Unknown/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support <i>Community Justice broadly refers to all variants of crime prevention and justice activities that explicitly include the community in their processes and set the enhancement of community quality of life as a goal. Recent initiatives include community crime prevention, community policing, community defense, community prosecution, community courts, and restorative justice sanctioning systems. Approaches share a common core in that they address community-level outcomes by focusing on short and long-term problem solving, restoring and supporting victims and communities, strengthening normative standards, and effectively reintegrating offenders.</i>	Arrests	VC & ECON	Easy (GPP)		L
Prioritize Restorative Justice and Survivor/Victim Support	Terry stops (profile-stop-and-frisk)	VC & ECON	Easy (State of Black Oregon)		L
Prioritize Restorative Justice and Survivor/Victim Support	Sentencing	VC & ECON	Hard/Unknown/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Location and population at correctional facilities	VC & ECON	Hard/Unknown/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Juvenile crime rate	VC & ECON	Easy (GPP)		L
Prioritize Restorative Justice and Survivor/Victim Support	Recidivism rate	VC & ECON	Easy (GPP)		L
Prioritize Restorative Justice and Survivor/Victim Support	Supportive policies (example: Ban the Box)	VC & ECON	Hard/Unknown/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Housing services	VC & ECON	Hard/Unknown/Unknown		L

Indicator (List all indicators in this column)	Indicator	Desired outcome (connect to one of the 6 desired regional outcomes)	Data (easy, medium or Hard/Unknown to get data?)	Priority (H, M, L priority for community)	Metro authority/control (H, M, L)
Prioritize Restorative Justice and Survivor/Victim Support	Economic development services	VC & ECON	Hard/Unknown/Unknown		M
Prioritize Restorative Justice and Survivor/Victim Support	Youth services	VC & ECON	Hard/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Domestic abuse shelters	VC & ECON	Hard/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Access to counseling & other support	VC & ECON	Hard/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	White collar crimes	VC & ECON	Hard/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Targeted community enforcement areas	VC & ECON	Hard/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Targeted transit center enforcement areas	VC & ECON	Hard/Unknown		L
Prioritize Restorative Justice and Survivor/Victim Support	Targeted drug-free zones	VC & ECON	Hard/Unknown		L
					Metro authority region-wide. Does not reflect authority over Metro-owned facilities or processes.



Community Partnership

A strategic approach to support long-term relationships with community-based organizations

September 2014

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.

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Prepared for Metro by Cynthia Alamillo, Oregon Fellow

EXECUTIVE SUMMARY

The Portland metropolitan region is changing. As communities become more diverse, so does the need to create conditions that allow everyone to participate and enjoy the benefits of making this a great place – for all. Community-based organizations (CBOs) have a strong impact in communities of color, low-income and other communities through engaging them in government services and policy processes. Consequently, Metro has begun to enhance its ability to engage underserved communities in Metro projects by partnering with CBOs through contracts, grants and sponsorships.

These initial steps are positive; however, this research has found that these efforts are currently siloed by projects, have not developed significant long-term relationships with these communities and have built limited civic capacity. This report shows that communication, institutional and capacity barriers, as well as limiting staff roles do not foster long-term meaningful relationships with CBOs. Current practices result in overlap in efforts and exhaustion of resources, and lack the consistency needed to engage underserved communities.

These barriers should be addressed by Metro so that meaningful and long-term relationships with CBOs can be fully successful and sustainable. Projects that involve CBOs should take into account the effect of these impediments and should adjust expectations accordingly.

The objective of this research project was to provide insight about current conditions in the partnering process at Metro and to provide recommendations on how to strategize partnerships with CBOs. This research is not a comprehensive assessment of all of Metro's partnerships, but it does provide a broad understanding of the existing partnership processes.

This research has six important findings:

- Metro and CBOs both have a strong willingness to build long-term relationships.
- Fragmentation of internal communication creates overlaps in outreach efforts – multiple approaches to the same CBO for similar purposes. This has led some CBOs to feel that partnering with Metro is demanding and burdensome.
- Metro's project-focused culture creates a challenge to keep investing in relations not connected to the current project. CBOs express frustration when there is no follow-up after a project is completed.
- Metro staff are using time off from work to foster relationships.
- Staff roles are not structured to build long-term relationships. Staff emphasized that there is a gap between establishing the relationship and maintaining it.
- Grant and sponsorship funding opportunities generally lack transparency and accountability mechanisms.

Based on these findings, the following recommendations are suggested:

- Develop standard communication across departments; create and maintain the infrastructure necessary to collect and report CBO data.
- Create a supporting environment by recognizing the value in long-term relationships.
- Create internal capacity and provide the resources needed to support the process of building long-term, strategic relationships.
- Strategize funding of contracts, grants and sponsorships awarded to CBOs.
- Develop alternative forms of capacity building within CBOs.

SUMMARY OF FINDINGS

Strong willingness to build long-term relationships. There is an openness and willingness to understand and commit to the long-term nature of the partnership process on the part of Metro and CBOs.

Communication barriers. Metro faces several key communication barriers in its work with CBOs:

Internal communication. Fragmented communication creates overlap efforts in outreach – Metro is reaching out to the same CBOs multiple times for the same or similar purposes. This has led some CBOs to feel that partnering with Metro is demanding and burdensome.

External communication. It is a challenge for CBOs to understand Metro’s mission and its impact in the community.

Data collection and standardized tools. Staff talked about the need to develop a centralized database to keep track of the CBOs involved with Metro and to share knowledge across the agency.

Institutional barriers. Metro faces several key institutional barriers in its work with CBOs:

Project-focused culture. Staff moves from project to project. It is a challenge to keep investing efforts in relationships not connected to the current project. CBOs expressed frustration when there is no follow-up after a project is completed.

Internal diversification. Staff identified the need to diversify personnel and management positions to meet the needs of CBOs and underserved communities.

Different definitions of a relationship. At Metro relationships are often expected to naturally happen because a contract, grant or sponsorship was awarded. When funding is awarded, a relationship is assumed, but the maintenance of that relationship is not very clearly defined. For CBOs, relationships and the process of developing them require time, in-depth knowledge of the organization and community, and clear identification of the value added.

Capacity barriers. Fostering and maintaining relationships is time-consuming. Metro staff often have to use time outside of regular work hours. CBOs’ key capacity barriers are limited funding and insufficient technical knowledge to engage with Metro. Additionally, due to limited capacity to submit proposals and enter competitive contract processes, small and emerging CBOs feel overlooked by Metro.

Limiting staff roles. The role of staff is not structured to build long-term relationships. There is a gap between establishing the relationship, maintaining it and transferring it - either to another project or when staff leave the project.

Inadequate transparency and accountability. Funding opportunities may lack transparency and accountability mechanisms, including information on availability of funds and decision-making process details.

SUMMARY OF RECOMMENDATIONS

This report splits recommendations into three stages based on near-term, medium-term, and long-term projects.

Stage 1 - Near term

RECOMMENDATION 1: Develop standard communication across departments; create and maintain the infrastructure necessary to collect and report CBO data

- Institutionalize the current 'Equity Roundtable' meetings to a standing committee or advisory board.
- Integrate data collection systems and establish policies and procedures to guide data entry and use.
- Develop monitoring and assessment mechanisms that evaluate the status, progress and outcomes of relationships.

Stage 2 - Medium term

RECOMMENDATION 2: Create a supporting environment by recognizing the value in long-term relationships

- Institutionalize the importance of timely partnership exploration and dialogue.

RECOMMENDATION 3 - Create internal capacity and provide the resources needed to support the process of building relationships

- Officially allocate time to explore and maintain strategic relationships using agreed-upon guidelines or create a staff position that would function as a liaison for the agency.
- Continue developing internal cultural competence and make engagement an integral part of all positions.
- Support research on advanced strategies of partnering with CBOs that could lead to innovative practices.
- Create opportunities for CBOs and Metro to discuss community issues, to explore future opportunities for partnerships and to connect with other CBOs.

RECOMMENDATION 4 - Strategize funding of contracts, grants, and sponsorships awarded to CBOs

- Explore options to adjust technicalities of contracts, grants and sponsorships to increase the pool of applicants. Offer technical assistance throughout the application process.
- Explore the diversification of funding through long-term grants and re-granting.
- Explore centralizing funding to provide a coordinated, agency-wide approach.

Stage 3 - Long term

RECOMMENDATION 5 - Develop alternative forms of capacity building within CBOs

- Partner with CBOs to lead community-level leadership development programs to increase the civic capacity of CBOs and the community.
- Become a resource for CBOs in a different capacity, such as being a connector, referral, consultant and as a board or committee member.

INTRODUCTION

The region is growing. Within the next 25 years, the population will increase from 1.4 million to about 2.4 million¹, including growth in underserved, low-income and/or communities of color, and limited English proficiency population. This demographic shift coincides with Metro's commitment to ensure all residents in the region are engaged in decision-making and have access to services by supporting diversity, equity and inclusion actions. Moreover, Metro's engagement efforts have expanded to include a process of engagement through community-based organizations (CBOs). Metro has found access to diverse and underserved communities by building partnerships with CBOs through contracts, grants and sponsorships.

These efforts recognize and support the strategy of connecting with CBOs as one of the most effective outreach approaches to engage underserved communities in government services and policy processes.²

But despite its good intentions, Metro's efforts to date to engage CBOs are not sufficient to ensure an effective engagement outcome. As diverse communities grow and change, new CBOs emerge and develop. As such, CBOs have a wide range of capacity and skills, while Metro has more options for partnerships than ever before. As Metro seeks to develop better relationships with both established and emerging CBOs, its partnering process must become more strategic to prioritize efforts, avoid overlaps, respect Metro's and CBOs' capacity, and ultimately to improve engagement with underserved communities.

The purpose of this paper is to develop an agency-wide strategy built on current partnerships efforts and existing knowledge in a way that generates the best possible value today and greater value in the long-term. While acknowledging the challenges and benefits of working with CBOs, recommendations are provided that, if implemented, will improve the success of Metro's partnerships with CBOs.

Work efforts around diversity, equity and inclusion

- In 2012 the Equity Strategy Program was developed to define and implement an agency-specific equity strategy that is actionable and measurable
- In 2012, the Metro Council adopted the Diversity Action Plan with goals and priorities in four core areas
- In 2013, the Metro Council adopted the Public Engagement Guide which establishes best practices for inclusion

SECTION I – The Impact of community-based organizations

This section explores the concept of community-based organizations and their importance for underserved communities and for Metro.

What are community-based organizations (CBOs)?

A CBO is a public or nonprofit organization that involves community residents in addressing human, educational, environmental and public safety needs.³ In general, CBOs operate within the community with local residents identifying strategies to better serve the community. Many CBOs have difficulties organizing projects due to time constraints, budget restrictions and limited staff. Obtaining funding is also a major challenge, as capacity development is largely directed by those more powerful in the sector, such as donors, NGOs and local government institutions.⁴ Consequently, due to limited funding or funding delays, CBOs often have challenges planning for the future or for long term projects.⁵

Importance of Metro’s involvement with CBOs

CBOs have a thorough understanding of their communities, including pressing challenges and limitations. This knowledge helps prioritize problems, initiate actions within their context and communicate them effectively. Moreover, CBOs have the ability to communicate the needs of the community and are typically able to mobilize them.

Since CBOs' operating offices are usually within the community they serve, they inherently represent a sub-section of a particular community. Partnering with CBOs is valuable because they:

- possess relatively larger reach⁶
- engage targeted communities⁷
- build relationships with communities⁸
- refer residents back to government agencies or departments⁹
- assist in the education process for government services.¹⁰

Therefore, it is suitable for Metro to work with CBOs to increase representation and provide adequate services to a diverse community.

For instance, the Equity Strategy Program work plan calls for establishing an equity baseline made of measurable regional indicators. In order to come up with that baseline report, six CBOs were selected in October 2013 through a competitive procurement process: Adelante Mujeres, Asian Pacific American Network of Oregon, Center for Intercultural Organizing, Coalition for a Livable Future, OPAL Environmental Justice Oregon and The Urban League of Portland. The six CBOs have been working with Metro staff to identify the set of indicators and data points that

measure the state of equity in the Metro region. This report will serve as the foundation for the development of Metro's Equity Strategy, which will be completed in 2015.

Importance of long-term relationships with CBOs

Local governments' performance and reach improves when CBOs provide access and information to their constituencies.¹¹ Partnerships between community and local government also provide a basis for institutional strengthening at the local level.¹² However, the best partnerships are forged over time and are a result of genuine needs, not just because of a project, grant or funding process.¹³ Therefore, to develop long-term relationships Metro needs to strategize efforts to develop genuine partnerships and create long lasting positive impacts in underserved communities.



SECTION II – Best Practices for Building Relationships

Genuine partnerships depend on more than providing a project or awarding funding. They require time, effort and value to succeed. This section lists the key principles of strategic collaboration practice and best practices to build long-term relationships (see Appendices A-E).

Principles of strategic collaboration¹⁴

- Principle 1: Choose strategic collaboration wisely
- Principle 2: Understand the strategic collaboration life cycle
- Principle 3: Strengthen leadership capacity
- Principle 4: Balance risk and reward transparency
- Principle 5: Cultivate innovation for meaningful change
- Principle 6: Emphasize outcomes and impacts

Building Long-term Partnerships

A structured approach to building partnerships is critical to achieve long-term relationships. The Compassion Capital Fund (CCF), administered by the U.S. Department of Health and Human Services, created a guidebook about establishing and managing partnerships. The guidebook includes several steps to forming a partnership, including:¹⁵

- Step 1: Define the need for a partnership. Identify the need for a partnership by identifying the short-term interests (twelve months) and the long-term interests (eighteen to thirty-six months) from all partners.
- Step 2: Start the process. Establish responsibilities, objectives and shared vision and goals to effectively identify the connection of the involved partners
- Step 3: Set up and maintain the partnerships. Create partnership guidelines and implement evaluation and monitoring objectives.
- Step 4: Partnership transition, ending and renewal. Communicate with partners the future of the partnership.

SECTION III – Existing challenges when building partnerships

This section identifies some of the challenges that Metro has experienced when building relationships. It highlights recent projects' work with CBOs and reviews findings from interviews with Metro staff and CBOs.

Review of recent CBO partnership approaches

This section describes Metro projects that have built and strengthened partnerships with CBOs to increase participation of underserved communities and identify key findings.

Partners in Nature

In May 2013, the region's voters passed the Parks and Natural Areas Local Option Levy that will generate \$8-10 million per year over a five-year period.

In June 2014, project staff met with twelve CBOs serving underserved populations to develop the initial framework for the project (see Appendix F). A second gathering involved twelve additional CBOs and identified strategies to develop long-term relationships with them (see Appendix F). A CBO was contracted to host and facilitate this second gathering. Additionally, project staff launched pilot partnerships to include Metro in CBOs' leadership trainings, create career opportunities and include field outings for their youth programs. Both of these approaches include contractual relationships that generated a strong initial connection with CBOs. These are new and/or incomplete partnerships, so it is premature to conclude how effective these partnerships have been. However, the project's efforts to identify how to work together and identify the value added in the future relationships are promising practices.



Climate Smart Communities Scenarios Project

The Climate Smart Communities Scenarios Project was initiated in response to a state mandate from the 2009 Oregon Legislature to reduce per capita greenhouse gas emissions by 20 percent from cars and small trucks by 2035.

In the final phase of the project, staff contracted with a consulting firm to facilitate two discussion groups with CBO leaders. In the first discussion, held in February 2014, CBO leaders were invited to weigh in on the investments and actions under consideration. The second discussion was an open dialogue with CBO leaders on how Metro could ensure that recommended investments and actions are implemented equitably. Although this approach was contracted out to a private organization, it allowed Metro to further build its understanding of different communities and became a connector between organizations through direct interaction. However, when private entities are contracted instead of CBOs to perform outreach, there is concern that they are the ones that create real relationships with the community. In this case, CBO leaders expressed frustration about the time that elapsed between the initial engagement in summer 2012 and perceived lack of follow-through on the issues they originally raised.

Powell-Division Transit and Development Project

This project is a 15-month study to develop a community-supported vision for high capacity transit and neighborhood and commercial development along Powell Boulevard and Division Street, connecting downtown Portland, southeast and east Portland and Gresham.

To ensure community input and consideration before the development project starts, project staff have focused on developing partnerships with CBOs to be reflective and responsive to the community interest. Grants were awarded to CBOs to effectively engage communities with limited English proficiency and to help project staff understand community needs and preferences.

Since the large scale of the project requested comprehensive outreach investment, strong partnerships have thrived. In the same way, the project has generated standardized documentation of engagement efforts and progress, creating accountability and transparency in the community's input and participation. On the other hand, smaller projects do not have the enough time allocated to develop such sophisticated relationships since they have tight deadlines or different priorities.



Language Discussion Groups

Seeking to prioritize translation of documents and learn about the needs and interests of communities that have a limited ability to speak English, Metro held a competitive contract process and contracted with six CBOs to conduct language discussion groups (see Appendix G).

In 2013, partial funding was provided to the CBOs at the initial stage of the partnership. At the end, the selected CBOs held three discussion groups in Spanish, two in Chinese and one each in Russian and Vietnamese. These partnerships were fully successful; however, it is a concern that only established CBOs submitted their proposals. This situation underlines potential limitations for emerging CBOs.

¡Vámonos! Let's Explore Cornelius, Forest Grove and Hillsboro

In the summer of 2011, Metro launched a marketing campaign to encourage Hispanic families in Washington County - particularly in low-income areas of Cornelius, Forest Grove and Hillsboro - to live more sustainable lifestyles and use travel options.

Metro worked in close partnership with CBOs to create printed and online biking and walking maps in Spanish and English (see Appendix H). Metro also awarded financial sponsorships to CBOs to help promote the program. However, there is ambiguity on the status of the relationships created in this project, due to limited follow-up after the completion of the program.

Internal Perspectives

This section describes the findings that emerged from internal interviews with Metro staff (see Appendix I). Interviewees were selected for this project because they have engaged with CBOs in multiple capacities and in different time intervals – short and long term investments.

Findings

Strong willingness to build long-term relationships

The value of building long-term relationships with CBOs is well accepted among staff. Staff showed openness and willingness to understand and commit to the long-term nature of partnership process with CBOs.

Some interviewees discussed how their best outreach outcomes were in part due to the initial time dedicated to first explore and understand CBOs, and as such, they now seek further support to continue this practice.

Moreover, staff noted that the recent Diversity Action Plan and the Equity Strategy Project has helped promote a desire to improve engagement efforts, and has also added a significant degree of encouragement to the learning process of diversity and equity standards.

Staff identified significant desire and need to develop meaningful relationships with CBOs

Communication barriers

- Internal communication. Staff expressed concerns about existing limited internal communication. Within the agency, there is fragmented communication between departments and between projects. As an outcome of this, current outreach efforts are overlapping - reaching out to the same CBO multiple times for the same or very similar purposes, and consequently exhausting the CBO's capacity and interest in engagement

Staff also remarked about the need for communication channels to share lessons learned from working with CBOs, to exchange ideas and, most of all, to build upon existing relationships and avoid repeating the exploration process.

- External communication. Staff discussed the difficulty for CBOs to understand what Metro is, what it does, why it is worthwhile to work with the agency. Staff considered this struggle as one reason that CBOs do not participate in timely stages of the project but rather when the action or project is nearly completed. This limitation has created a mismatch in expectations as CBOs are often participating at a lower rate than expected.

Similarly, the technical process used by Metro in contracts and requests for proposals is difficult to convey to CBOs. Staff addressed interest in adapting or adding a flexibility factor to funding processes to allow a wide range of CBOs to apply.

Staff also expressed a desire to explore and gather information, such as strategies and activities employed in sustained partnerships from other local governments, different jurisdictions and even from other states, as learning tools and as a means to enrich partnerships.

- Data collection and standardized tools. Staff talked about the need to develop a centralized database to keep track of the CBOs involved with Metro, their point of contact, work history, capacity and the funding and contracts awarded to them. Since there is no centralized data source for CBOs, current knowledge is not shared across the agency. This lack of infrastructure is particularly limiting for new projects, leaving them to initiate the partnership efforts from scratch even though the agency has existing relationships with CBOs. *(NOTE: Metro is launching a data tool this fiscal year that should address this recommendation.)* Furthermore, the agency could potentially make different decisions on contracts, grants and sponsorships if there are comprehensive records of CBOs that have fiscal connections with Metro.

Additionally, there are no standardized assessment and monitoring mechanisms to review the progress and effectiveness of existing partnerships. Staff discussed the difficulties in determining whether a partnership is effective or not.

Institutional barriers

- Project-focused culture. The current project-focused culture of the agency provides limited resources, time and staff to foster and manage relationships with CBOs. When staff shift from one project to another, the relationships with CBOs can lapse. Accordingly, staff discussed how they place their effort on the project and not on the relationship itself.
- Internal diversification. Staff also mentioned that the composition of the agency, particularly the limited diversity of staff and management, hinders engagement with CBOs because there is less identification and cultural connection with underserved communities and communities of color.
- Perception of relationships. Staff perceive relationships to be established once a contract or project is awarded, or when a sponsorship or grant is approved. Some

Relationships are expected to naturally happen and evolve because contracts were awarded

relationships are solely contractual with no perceived need or interest in fostering the relationship during the contracted period or afterwards. Staff identified that relationships are sometimes viewed as a transaction or a 'check the box task' rather than opportunities to create new partnerships or strengthen existing ones to increase engagement with underserved communities.

Capacity Barriers

Staff reported that there is not enough capacity to develop new relationships and to engage in long-term relationships. Many staff members make an extra effort outside the agency to nurture such relationships. In addition, there are no mechanisms to prioritize time and projects to avoid exhaustion of CBOs and to manage the relationship after the completion of a project.

Staff are working off-time to establish relationships with CBOs

Additionally, staff noticed how small or emerging CBOs are not frequent partners; and larger and more established CBOs are the main participants throughout the agency. Staff commented that this is due to not having enough resources to identify new potential partners.

Limiting staff roles

The role of staff is not structured to build long-term relationships. Staff emphasized how there is a gap between the process of establishing a relation for a project and the strategic process of building a relationship for the long-term. Staff discussed how it is challenging to consider what will happen to the relationship once the project is done, what will happen if the person who initiated the relationship leaves or who will manage the relationship after the project is completed.

Staff identified that their roles are not structured to build long-term relationships

Staff also expressed their awareness of how effective relationships consist of a two-way effort, by the agency and the CBOs, but they described uncertainty on how to take the next steps to develop a long-term relationship.

Perceived barriers for CBOs

Staff expressed their perceptions of the barriers CBOs experience when working with Metro. There is an understanding on how every project is a learning process for CBOs due to the complexity of the agency and CBOs' limited knowledge of Metro's processes. It was suggested that it would be beneficial for CBOs to

It is perceived that CBOs find partnering with Metro demanding due to the technical nature and complexity of processes

receive support on how to effectively participate on a contract process and on grants/sponsorships.

Staff also acknowledged that the potential exhaustion by multiple approaches and overlaps in efforts has led some CBOs to feel that partnering with Metro is a stressful process. Furthermore, staff are aware that some CBOs are frustrated when there is no follow-up after a project is completed, creating a perception that they are only approached when needed, not when Metro desires a meaningful outcome. Staff also discussed capacity issues that limit CBOs' ability to recognize the big picture of projects instead of focusing on the immediate needs.

External Perspectives

This section describes the findings that emerged from a two-pronged engagement process (see Appendix J). The first phase consisted of one-on-one interviews with three CBOs. The CBOs interviewed were 1000 Friends of Oregon, Center for Intercultural Organizing (CIO) and Momentum Alliance. The second phase included the review of two reports initiated by Metro's Parks and Natural Areas Program that identified CBOs' obstacles when partnering with Metro.

Findings

Strong desire to establish long-term relationships with Metro

CBOs emphasized the strong positive vision they have for long-term partnerships with Metro.

Agency culture

CBOs addressed the challenge that different systems (Metro vs. CBO) create when working on contracts and timelines. The requirements for partnering often put a large strain on CBOs.

CBOs expressed frustration due to the lack of follow-up and consistent engagement as most partnerships are on a project-specific basis. This has created disappointment within the community, especially since each project raises expectations of a meaningful relationship. Lastly, CBOs noted dissatisfaction when they provide input when required or in crisis situations, and their feedback appears to be disregarded.

Capacity barriers

CBOs' limited capacity in funding, staff and technical knowledge hinders their potential involvement with Metro by creating the idea that partnering with the agency is burdensome. Moreover, smaller CBOs are more vulnerable to such

limitations, while Metro relies too much on gatekeepers who do not always adequately represent the community. CBOs expressed desire for grant program funds be scaled in size and scope to be accessible to both large and small organizations.

Inadequate transparency and accountability

CBOs discussed the lack of appropriate transparency and accountability in decision-making and funding processes. For funding programs, CBOs emphasized the need for clear and concrete reasons for why they were or were not awarded funding. They also acknowledge the benefit of knowing the total availability of funds, past recipients, funding formulas and the amount each partner received.

Regular presence and initial approaches

CBOs suggested that Metro should not become an unexpected visitor but rather have a regular presence among them to build trust. CBOs would like to meet informally with Metro to share trending issues and to increase awareness of each other. Additionally, participants commented that they would like Metro to go into the community and meet with the community members directly.

Similarly, CBOs suggested to first develop conversations on why their input is important before introducing the technicality of the project, since it takes them time to understand the scope of it.

Communication barriers

Communication between departments in government is often siloed, which leads to confusion, creates misunderstandings and causes duplication. CBOs feel they are often asked for input, but rarely see tangible results. When they are asked for input there is no clear picture of what has already been done and what decisions have been made prior to the outreach effort. Additionally, CBOs noted that they do not have staff with the same background as Metro, making conversations with highly technical jargon a burden to them. Moreover, it is also complex to understand the mission and role of the agency, and the impact it has in the community.

Participants also discussed that if Metro has worked with CBOs already, the agency as a whole should have a basic understanding of the CBO and should avoid repetition.



SECTION IV – Recommendations

Based on the findings from existing Metro projects, staff interviews and CBOs' feedback the following recommendations have been developed. They are organized into three stages based on how immediately they can and should be implemented by Metro.

Stage 1 – Near term

RECOMMENDATION 1: Develop standard communication across departments; create and maintain the infrastructure necessary to collect and report CBO data

Lack of communication means that current outreach efforts are overlapping and may exhaust the CBOs' capacity. CBOs develop dissatisfaction because of duplication of effort. Limited capacity to collect data makes it difficult for staff and for upcoming projects to identify prospective partners, share lessons learned, and connect with different CBOs.

In order to improve communication and collect all data necessary, Metro can:

- Institutionalize the current 'Equity Roundtable' meetings to a standing committee or advisory board. The roundtable has showed results in avoiding overlaps and helping disseminate connections with CBOs. As the group formalizes, it could also include community leaders to reinforce the commitment to long-term partnerships. An alternative communication outlet is a hub that will allow collaboration across departments. Marin County in California practices one example of a hub. These improvements can avoid overlaps and help disseminate connections with CBOs.

Marin County Health and Human Services 'Prevention Hub' – Marin County, CA

The Prevention Hub is a cross-divisional effort that collaborates to improve partnerships with schools, communities and organizations on prevention practices.¹⁶ Staff from different departments work together on all prevention-related initiatives, regardless of the issue or department and coordinates the services provided. The purpose of the Prevention Hub is to centralize all issue-based engagement into one location so that efforts can be leveraged to their fullest potential.¹⁷

- Integrate data collection systems and establish policies and procedures to guide data entry and use. Support data collection and management processes that can be used to track connections with CBOs to build upon existing partnerships and help prioritize efforts. For example, a centralized data tool like a customer relationship management tool (CRM) could help create an inventory of the all the connections with CBOs. *(NOTE: Metro is launching a data tool this fiscal year that should address this recommendation.)* Standardized forms of collecting and sharing data will help departments transfer information and allow for more strategic outreach and engagement. Additional supporting tools include a dashboard to share information and project "post-mortem" exercises – assessment done after the completion of projects to identify lessons learned.
- Develop monitoring and assessment mechanisms that evaluate the status, progress and outcomes of relationships. Indicators and mechanisms identify the development of the relationship outcomes, including technical, fiscal, administrative and capacity development to promptly identify challenges and evaluate partnerships. Mechanisms need to include alternative approaches that provide staff with options to evaluate their progress.

Citywide Nonprofit Monitoring and Capacity Building Program – San Francisco, CA

The city of San Francisco contracts with hundreds of non-profit organizations to deliver some of its services throughout the city. To consolidate functions, in 2005, the city initiated the Citywide Nonprofit Monitoring and Capacity Building Program (see Appendix K).¹⁸

Program elements:

- Monitoring – Includes a standard monitoring form to assess CBOs progress (unique compliance items are reviewed separately). The form includes three sections:
 - Fiscal review: budget, cost allocation procedures, audited financial statements, tax forms, fiscal policies, financial reports, invoices, payroll and timesheets
 - Compliance review: board minutes and meetings, and public access to records
 - Governance review: board of directors
- Non-profit Corrective Action Policy – departmental guide for when contractors fail to meet the city monitoring standards
 - ‘Elevated concern’ status: indicates non-profits have not responded efficiently
 - ‘Red flag concern’ status: indicates non-profits might not be able to perform
- Resources for departments and non-profits: technical assistance (one-on-one coaching & small group trainings) and collection of documents (sample forms and guidelines)
- Annual survey for contractors to provide feedback and assess the program

Stage 2 – Medium term

RECOMMENDATION 2: Create a supportive environment by recognizing the value in long-term relationships

The agency is not currently well positioned to fully develop and maintain long-term relationships because the project by project approach has resulted in multiple interpretations of the definition of partnerships.

- Institutionalize the importance of timely partnership exploration and dialogue. A suggestion is to develop agency-wide principles of relationship building that will help identify the *optimal quality and quantity of resources to invest in relationships and that will prioritize the importance of long-term relationships*. These principles should include components of the importance of partnerships and how they relate to the agency's mission as well as considerations of the time and nurturing they require. It is also crucial to encourage the application of the principles and support further connections with partners, from creating informal relationships to becoming regular users of the CBOs' services and connections. A promising effort to encourage increased civic engagement internally is to include this component in employee performance reviews.

Performance Management Initiative – Arlington County, VA

In 2012, the county of Arlington initiated a process to identify the criteria to evaluate civic engagement through a staff performance review.¹⁹ By the following fiscal year, department directors and staff incorporated civic engagement into key work expectations where appropriate. Civic engagement is one of the priorities of the county and, as such, constructive participation is an expectation for county staff. This tool is one part of the larger effort called PLACE (Participation, Leadership and Civic Engagement), with a goal of engaging community voices to achieve the county's vision.

RECOMMENDATION 3: Create internal capacity and provide the resources needed to support the process of building relationships

Staff positions are not currently structured to maintain long term relationships. There is a gap between building relationships and maintaining the relationships once the expected involvement is completed.

- Officially allocate time to explore and maintain relationships or create a staff position that would function as a liaison for the agency. For relevant positions, expand their roles to fully invest resources into building strategic partnerships using agreed-upon guidelines. An alternative is to create a liaison position that will solely manage and support partnerships.
- Continue developing internal cultural competence and make engagement an integral part of all positions. In order to improve the success of community outreach, staff at Metro need to have a certain level of cultural competence. This can be achieved by emphasizing existing diversity and cultural trainings, as they increase the agency's level of validation and trust towards improving relationships with CBOs and empower staff to meet engagement goals.
- Support research on advanced strategies of partnering with CBOs that could lead to innovative practices. The agency can benefit from efforts done by other jurisdictions.
- Create opportunities for CBOs and Metro to discuss community issues, to explore future opportunities for partnership and to connect with other CBOs. Forums can be created to provide information, develop awareness of Metro and discuss topics important to the community.

Open Door Monday – Arlington County, VA

Open Door Mondays are informal opportunities to meet with a county board member without any appointment or any agenda.²⁰ Topics of the sessions range from policy discussion, bus stop concerns, to information on how to interact with government. Board members attend on a rotating basis and sessions are held at four different locations across the community. After each session, participating board members share the outcome of the sessions with colleagues.

RECOMMENDATION 4: Strategize funding of contracts, grants and sponsorships awarded to CBOs

Contracts, grants and sponsorships are significant tools to establish long-term relationships; however, it is large and established CBOs that dominate most of the funding opportunities, while smaller CBOs are often unable to fulfill the requirements.

Strategizing these opportunities increases the possibility of building meaningful partnerships across a larger spectrum of stakeholders.

To strategize direct funding opportunities Metro can:

- Explore options to adjust the complexity and technical level of contracts, grants, and sponsorships to increase the pool of applicants. Propose different application processes that would match the intent and capacity of applicants to simplify the requirements or add a flexible component to the existing process.

Additionally, consider providing technical assistance throughout the process, such as grant writing, writing proposals and budgeting issues. Furthermore, continue looking for ways to build other areas of CBO capacity.

East Portland Action Plan, Civic Engagement Grants Program – Portland, OR

The Civic Engagement Grants program encourages and implements culturally specific and language appropriate civic engagement to increase community involvement.²¹ To further support applicants, proposals can be submitted in any language without limiting their ability to receive an award. Supporting resources also include interpretation services, a computer to use throughout the process, and grant writing. Moreover, the program offers regular grant information sessions to help with the application process.

Another effective approach of the program is having an instructive application form that clearly directs applicants how to fulfill each requirement by providing templates, detailed information on the criteria used for the decision-making, application checklist, and step-by step procedure to create their writing proposal.²²

- Explore the diversification of funding through long-term grants and re-granting. Long-term awards and commitments inherently lead to long-term relationships, increasing the collaboration between Metro and CBOs. Long-term commitments can have flexible criteria for renewal after each year in case any adjustments are needed. Additionally, contracts can include a re-granting section for the contracted CBO to re-grant small and emerging CBOs since they have limited resources to apply to long-term commitments.

Northwest Health Foundation – Portland, OR

The Northwest Health Foundation just launched an initiative to craft five-year partnerships (\$50,000-\$150,000 a year) with ten CBOs that will support equity and community health.²³ Selected CBOs will also engage in peer-led technical assistance and will work as a cohort in all policy decisions and communications.

- Explore centralizing funding to provide a coordinated, agency-wide approach. Centralizing funding provides streamlined access to CBOs that are receiving funding from Metro, thereby allowing staff to quickly assess the capacity of a CBO. Using a consistent and well-coordinated approach can also help broaden the range of CBOs that receive funding from Metro, by identifying the CBOs that dominate in contracts, grants and sponsorships, and placing a cap on them to expand awards to less noticeable CBOs.

Stage 3 – Long term

RECOMMENDATION 5: Develop alternative forms of capacity building within CBOs

These are alternatives to meaningfully connect with CBOs.

- Partner with CBOs to lead community-level leadership development programs to increase civic capacity of CBOs and the community. Existing practices suggest that developing and encouraging leadership capacity provides significant contributions to the community. The key in leadership trainings is to leverage capacity while developing capacity. Metro can support CBOs to develop or support existing leadership training by providing contracts, sponsorships or grants (see Appendix L).

Diverse Civic Leaders Organizing Program (DCL) – Portland, OR

This program was funded by the Portland City Council in fiscal year 2006-07 with the purpose of building capacity for under-represented community-based organizations to increase their participation in government.²⁴ An initial contract for \$70,000 was awarded to three CBOs to host and facilitate leadership trainings for a minimum of 30 participants. The content of the training was left for CBOs to determine, so they can adapt it to their constituents. DCL now supports five leadership trainings annually hosted by different CBOs.

The positive outcomes that have arisen from this approach are the standing relationships, high interaction between CBOs, encouragement of collaboration and partnerships, higher organizational capacity and leadership skills and has created communication channels for CBOs and the community.

Although DCL's main role is of provider, DCL has developed strong connections with each partner as they continue supporting them with technical issues and expert knowledge. However, there are no significant accountability or assessment measures to track the progress of the contract. This year DCL will initiate their first evaluation and results will be considered for the renewing phase of the contract.

- Become a resource to CBOs in a different capacity, such as a being a connector, referral, consultant and as a board or committee member. There will always be limitations on the contractual and fiscal relationships that can be established due to budget; however, there are alternative ways to develop relationships with CBOs. Metro can function as a connector and help CBOs interact with other jurisdictions, provide expert knowledge and help CBOs on technical issues or participate in leadership trainings. Metro staff could even become participants in their boards and committees. Moreover, Metro can provide opportunities for CBOs to use Metro's facilities to host their meetings or special gatherings.

1000 Friends of Oregon's Land Use Leadership Initiative (LULI) – Portland, OR

The leadership training program was established in 2012 and connects participants with leaders in the public, private and non-profit sectors.²⁵ Each year LULI selects candidates from the community to learn about land use, gentrification, sustainability, and urban renewal, among other topics. This year, LULI has partnered with Metro to be part of the curriculum. This partnership has no fiscal attachment but it has created mutual benefits (see Appendix M).

CONCLUSION

Relationships with community-based organizations have a direct impact on the quantity and quality of engagement of underserved communities in Metro decision-making processes and services. This report acknowledges the difficulty of initiating and maintaining long-term relationships and also highlights the value in developing long-term relationships with CBOs to create a bigger impact in underserved communities.

As this report has underscored, a key step to overcoming the challenges of establishing long-term relationships is the improvement of communication to avoid duplicating efforts and to build on existing partnerships rather than recreating initial approaches. Another critical need identified is better data collection tools and assessment mechanisms to continually regulate and standardize the efforts to maximize the efficiency of the relationships. The report also includes recommendations to create a supportive environment and build capacity, strategize direct funding and create alternative methods of capacity building.

Partnerships, as well as their successes and challenges, can vary across departments and projects, but they share a common goal – to meaningfully engage underserved communities as part of Metro’s responsiveness to the residents of the region. In recent years Metro has made significant efforts to be more diverse, equitable and inclusive to achieve its mission of making this a great place for all. Building long-term relationships with communities through community-based organizations is an essential part of this effort and the success of the regional vision.

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Appendix A – Best practices for building relationships

Genuine partnerships depend on more than providing a project or awarding funding. They require time, effort and value to succeed. This section lists the key principles of strategic collaboration practice and best practices to build long-term relationships.

Principles of strategic collaboration¹

- Principle 1: Choose strategic collaboration wisely. Acknowledge and understand that there are instances where working independently is more appropriate than collaboration. For instance, if a project calls for an immediate fix, then a collaborative approach may not be right. Establish guidelines to help determine when to use strategic collaboration.
- Principle 2: Understand the strategic collaboration life cycle. Understand the organization life cycle to determine available resources, challenges and opportunities.
- Principle 3: Strengthen leadership capacity. Leadership is a key component to build a common purpose, share a common base of knowledge and, most of all, to address the potential challenges of working with multiple stakeholders.
- Principle 4: Balance risk and reward transparency. Align the purpose and mission of participants and the collaboration itself and clarify expectations and outcomes. A suggestion is to practice a ‘return on investment’ exercise to define the value of the collaboration.
- Principle 5: Cultivate innovation for meaningful change. Explore multiple points of view, create learning opportunities and creative communication outlets and encourage open expression.
- Principle 6: Emphasize outcomes and impacts. Set criteria for measuring and monitoring, share knowledge and recognize accomplishments. Identify what stakeholders need to track and to identify successful progress. Establish small, short-term, intermediate and long-term indicators to monitor. Recognize early successes early to increase engagement and enthusiasm of participants.

Building long-term partnerships

A structured approach to building partnerships is critical to achieve long-term relationships. The Compassion Capital Fund (CCF), administered by the U.S. Department of Health and Human Services, created a guidebook about establishing and managing partnerships.² The guidebook includes several steps to forming a partnership, including:

1. Define the need for a partnership
2. Start the process
3. Set up and maintain the partnerships
4. Partnership transition, ending and renewal

Step One: Define the need for a partnership

Identify the need for a partnership by identifying the short-term interests (twelve months) and the long-term interests (eighteen to thirty-six months) of all partners. The thought process should also include what each of the partners hopes to accomplish. See Appendix B for a proposed checklist to help identify potential opportunities for partnership.

Step Two: Start the process

This step is focused on team development, based on the "Forming-Storming-Norming-Performing" model:

- **Forming** - Start by forming the group for the partnership through a first set of meetings. Identify the need for the partnership, benefits, and commitment level. Additionally, identify existing efforts with similar purposes.
- **Storming** - Partners are open about the relationship, including sharing agreement, disapproval and criticism. Through the process, establish responsibilities, objectives and shared vision and goals to effectively identify the connection of the involved partners.
- **Norming** - At this point, the partnership reaches shared agreement and clear intention of avoiding duplication. If there are no positive outcomes at this stage, the group could potentially develop a level of frustration.
- **Performing** - In this stage expected outcomes appear.

Throughout the process it is important to ensure members participate from the earliest opportunity. To help identify these opportunities refer to Appendix B for a proposed checklist on how to start the partnership process.

Step Three: Setting up and maintaining the partnerships

In this stage a clear understanding of shared responsibility must be accomplished, especially since the challenge in this stage is to decide between strategic and operational actions. Appendices C and D provide a checklist to help with these stages.

- Setting up partnerships – This is a comprehensive state where open communication tools must be established and the partnership must be defined.
- Maintaining Partnerships – In this stage create partnership guidelines on how partners will interact with each other. Guidelines can include ground rules to identify the shared values, process of documentation, frequency of communication, and timelines for revision of goals and related issues.
- Implementing evaluation and monitoring – It is critical to implement evaluation and monitoring objectives to create learning opportunities and to identify if the objectives of the partnership need adjustment by the group.

Step Four: Partnership transition, ending and renewal

This last stage considers the issue of transition and ending. The question that needs to be address is “Why continue?” This is one of the most overlooked actions when building between members. Regardless of the future of the partnership, there needs to be direct communication with the group to determine the appropriate decision. This framework can be applied across different levels of a relationship as it mainly provides an approach to explore the impact, benefits and challenges of current and future partnerships.

¹Norris-Tirrell, D., & Clay, J. (2010). Strategic Collaboration in Action: Six Principles. In *Strategic Collaboration in Public and Nonprofit Administration: A Practice-based Approach to Solving Shared Problems* (pp. 73-98). Boca Raton, FL: American Society for Public Administration.

²U.S. Department of Health and Human Services. (2010). *Partnerships: Frameworks for Working Together*. Portsmouth, NH. Retrieved from:
<http://strengtheningnonprofits.org/resources/guidebooks/Partnerships.pdf>

APPENDIX B: Checklist to identify partnerships

This checklist can assist in the thought process of determining whether forming a partnership is the best choice.

CHECKLIST FOR EVALUATING POTENTIAL PARTNERSHIP OPPORTUNITIES
<p>➤ Is there a need for a partnership?</p> <p>On what basis is the partnership being set up? Is there a group of like-minded people with a shared vision who have decided that developing a partnership is the only route to achieving a goal? Are potential partners willing to support this?</p>
<p>➤ What organizational and collective benefits will be gained from setting up this partnership arrangement?</p> <p>Are there clearly identified goals that only a partnership arrangement could help achieve? What is the “added value” for potential partners? What is your and their organizational self-interest?</p>
<p>➤ Is someone else already doing something similar?</p> <p>Do other organizations have similar or the same goals? If so, have you considered approaching them to become part of their partnership arrangement to ensure work is not being duplicated? If not, incorporate lessons learned into new partnerships.</p>
<p>➤ Is there commitment from partner organizations to support the partnership?</p> <p>Have you approached partner organizations with the possibility of setting up a partnership?</p>
<p>➤ What strategies/local priorities will this partnership support?</p> <p>Consideration needs to be given to not only identifying local priorities the partnership supports, but also how the partnership impacts communities at a larger scale.</p>

Source: U.S. Department of Health and Human Services. (2010). *Partnerships: Frameworks for Working Together*. Portsmouth, NH.

APPENDIX C: Checklist to start the process

This checklist can assist in the thought process of identifying the resources needed for partnerships.

CHECKLIST FOR STARTING THE PARTNERSHIP PROCESS
<p>➤ Identify potential members</p> <p>Who should be involved? Do we have all the right people? What is the appropriate level of involvement for members?</p>
<p>➤ Identify responsibilities, arrangements, and objectives of leadership</p> <p>Who will take the lead? Who will have responsibility for driving the partnership agenda forward? What accountability arrangements are in place?</p>
<p>➤ Identify the shared vision and goals</p> <p>Is there a genuine shared vision and set of goals across the partnership? Do all partners understand how to achieve it?</p>
<p>➤ Determine plans and priorities</p> <p>Does the partnership have a strategy/action plan that clearly sets out why the partnership was set up, what it is going to achieve, who is going to do what, and by when? Where does this strategy/plan fit into wider strategies, and how does it link into partner strategies/local priorities?</p>
<p>➤ Determine the function and nature of the partnership</p> <p>What is the nature of the partnership? Has this been established?</p>
<p>➤ Identify benefits for targeted groups</p> <p>What are the benefits to targeted groups? Has the partnership agreed or identified outcomes for specific target groups?</p>

Source: U.S. Department of Health and Human Services. (2010). *Partnerships: Frameworks for Working Together*. Portsmouth, NH.

APPENDIX D – Checklist for setting up and maintaining partnerships

This checklist can assist in the thought process of setting up and maintaining the relationship.

CHECKLIST FOR SETTING UP AND MAINTAINING THE PARTNERSHIP	
<p>➤ Is there a genuine shared vision and set of goals across the partnership?</p>	<p>A common understanding of, and agreement to, the vision and objectives needs to be reflected in any documentation</p>
<p>➤ Are there clearly identified aims that all partners can articulate and agree to?</p>	<p>The partnership's goals need to be reflected in its actions and practices</p>
<p>➤ Is the purpose of the partnership clear? Are the members clear on what their role and responsibilities are? Are members clear on the “added value” of the partnership</p>	<p>Members need to agree and understand what their role and responsibilities are within the context of the purpose and outcomes. Members need to understand their role in collective decision-making, delivering activities, and representing partnerships.</p>
<p>➤ What skills and competencies do we need to manage and support the partnership? Has a full assessment been made of the skill and competencies required to support/manage the partnership?</p>	<p>The partnership needs to understand what skills and competencies it will need to achieve the goals, as well as to ensure processes are effective.</p>
<p>➤ To whom will the partnership report? Is there a process to report on progress?</p>	<p>Document the lines of accountability/reporting processes.</p>
<p>➤ Is there an accepted process for decision-making? Who is the accountable individual for the partnership?</p>	<p>The decision-making process needs to be understood by all members of the partnership.</p>
<p>➤ Is there an accepted performance management framework? Are processes in place to monitor performance and act on results? Do defined criteria exist against which to benchmark achievements?</p>	<p>Individuals responsible for delivery of the plan to partnership need to be specified.</p>
<p>➤ Is there an accepted commitment to joint investments/resources to support the partnership by all organizations/individuals?</p>	<p>Resources mean more than just money; they include time, knowledge, energy, and personnel.</p>
<p>➤ Is there a robust communication strategy in place? Do partners know about each other's organizations and what pressures and priorities exist?</p>	<p>It is important to have an effective communication system in place at all levels within the partnership and within partner organizations.</p>
<p>➤ Are there accepted ground rules for partnership work that include the</p>	

reconciliation of different organizational cultures and ways of working?

Being open and honest, communicating, and exchanging information in open networks will also help build trust within the partnership.

➤ **Is there an accepted program for partners to invest time so they can identify and agree to the vision, goals, and targets?**

Members need to agree on the vision, goals and targets. It is important to periodically repeat this exercise to review these goals and targets, checking that they are on track.

➤ **Is there a clear, measurable plan for administering the partnership? Is the plan clearly linked to partnership aims and objectives, and do all parties agree to this plan?**

The plan should also identify the process to review/update aims and outcomes when monitoring reveals it is out of date or reflects changing circumstances.

➤ **Are there clear processes in place to ensure all new members of the partnership are well informed of its purpose, aims and objectives?**

As the partnership grows and existing members leave, new members will come on board. It is important that each new member has a clear understanding of the purpose of the partnership.

Source: U.S. Department of Health and Human Services. (2010). *Partnerships: Frameworks for Working Together*. Portsmouth, NH.

APPENDIX E – Checklist for developing evaluation and monitoring

This checklist can assist in the thought process of developing evaluation and monitoring tools

CHECKLIST FOR EVALUATION AND MONITORING
➤ Do partners share a common vision? Are partners willing to make changes to achieve shared goals?
➤ What is the mandate of the partnership? Why was the group established and are members still clear about this (benefits and added value)? Do members understand and agree to the purpose and accept it as important?
➤ Does the work of the group still link to overarching national/local policies and strategies?
➤ Does the group possess shared values and accepted principles? If these are in place, has everyone agreed to them? Is everyone aware of these principles? Does the group still meet the original need for its existence?
➤ Does the work of the group involve all relevant parties? If not, why not? Are users and the community involved in practice? Is so, in what way?
➤ Has the group agreed upon a set of outcomes? Is everyone aware of these? How has the group measured progress against these outcomes? Is this done on a regular basis?
➤ Does the group work well together? How effectively does the group meet its aims and objectives? Do they agree on the aims and objectives? How are these reviewed and revised in light of any new policy/priorities?
➤ Is there a clear understanding of own/other's roles and responsibilities? Have these changed? How is it monitored?
➤ Is the purpose of the group known and understood outside the partnership itself? Is adequate information available about the partnership and its decisions? If there is a communication strategy, how effective has this been?
➤ Is there adequate monitoring, evaluation, and feedback? Does the partnership review its aims and objectives in the light of any changes/challenges to the outcome?
➤ What do individuals/organizations expect to receive from the partnerships? Has the partnership been successful in achieving its accepted outcomes? Is this communicated across the partners/externally?
➤ Have any organizational improvements occurred after the establishment of the partnership? What differences have resulted from the partnership?
➤ Is there mutual trust and respect? Are relationships between members good? If not, what action was taken to remedy this?
➤ Was the partnership supported by leaders/politicians (where relevant)? Were

the aims/goals of the partnerships clear to leaders/council members?

➤ Does formal and informal communication take place? Is there regular communication, or conflicting values/poor communication? Does the partnership work in an open or closed way?

➤ Does the membership of the partnership represent the right people? Does it fully represent target groups?

Source: U.S. Department of Health and Human Services. (2010). *Partnerships: Frameworks for Working Together*. Portsmouth, NH.

Appendix F: Partners in Nature – Participating CBOs

PARTICIPATING CBOs	
1 st Discussion	2 nd Discussion
<ul style="list-style-type: none"> • Adelante Mujeres • Asian Pacific American Network of Oregon (APANO) • Black United Fund of Oregon • Center for Diversity and the Environment (CDE) • Coalition of Communities of Color • Girls Inc. • Groundwork of Portland • Immigrant and Refugee Community Organization (IRCO) • Latino Network • Momentum Alliance • Self Enhancement Inc. (SE) • Urban League of Portland 	<ul style="list-style-type: none"> • Africa House • African Youth Community Organization • Asian Pacific American Network of Oregon (APANO) • Center for Intercultural Organizing (CIO) • Groundwork Portland • Latino Network • Native American Citizens Advisory Council (NACAC) • Native American Youth and Family Center (NAYA) • Oregon Somali Family Education Center (OSFEC) • Oromo Community Organization of Portland • Russian Speaking Network • Second Chances are for Everyone (SCAFE)

*Bold CBOs were included in both discussions

Appendix G: Language Discussion Groups – Participating CBOs

PARTICIPATING CBOs	
CBOs Included in the Solicitation	CBOs who were Awarded Sponsorships
<ul style="list-style-type: none"> • 211 Family Info • Adelante Mujeres • Asian Health and Services Center • Ecumenical Ministries of Oregon (EMO); Russian Oregon Social Services (ROSS) • El Programa Hispano • Immigrant Refugee Community Organizations(IRCO) • Mercy Corps Northwest • Centro Cultural • Neighborhood House • St. Anthony’s Church • The Oregon Chinese Consolidated Benevolent Association • Asian Pacific American Network of Oregon (APANO) • Center for Intercultural Organizing (CIO) • Coalition of Communities of Color • Native American Youth and Family Center (NAYA) • Latino Network • Los Niños Cuentan • Asian Pacific American Chamber of Commerce • Oregon Native American Chamber • Oregon Association of Minority Entrepreneurs • Metropolitan Hispanic Chamber of Commerce 	<ul style="list-style-type: none"> • Adelante Mujeres • Asian Health and Services Center • Immigrant Refugee Community Organization (IRCO) • Asian Pacific American Network of Oregon (APANO) • Latino Network • Los Niños Cuentan

Appendix H: ¡Vámonos! – Participating CBOs

Metro established partnerships with the following community organizations in the project area:

- Adelante Mujeres
- Centro Cultural
- Washington County Bicycle Transportation Coalition
- Willamette Pedestrian Coalitions

Additionally the project partnered with:

- M&M Swap Meet and Futsal Center
- City of Cornelius
- City of Forest Grove
- City of Hillsboro
- Virginia Garcia Memorial Foundation
- Washington County

Methods

The review of the agency's partnerships with CBOs that target underserved communities consisted of a series of internal interviews. Interviewees were selected for this project because they have engaged with CBOs in multiple capacities and in different time intervals – short and long-term investments. Interviewees came from the Communication department and staff for key project areas including Diversity Action Plan, Equity Strategy Project, Opt-in Participation, Partners in Nature, Title VI, Environmental Justice, Powell-Division Corridor Planning Project, Climate Smart Communities Scenarios Project, and Spanish-language marketing, plus contracts and grants programs.

Interviews were semi-structured with the intention of identifying key issues related to existing connections and experiences with CBOs, challenges and barriers, and suggestions to improve and develop long-term relationships. All interviewees willingly shared their experiences and communicated their interest in advancing partnerships with CBOs.

The core purpose of the interviews was to obtain general themes that will help provide a broad understanding of the internal status and perceptions of the process of building relationships with CBOs.

Methods

This review involved two phases. The first phase consisted of one-on-one interviews with three CBOs. The CBOs interviewed were 1000 Friends of Oregon, Center for Intercultural Organizing (CIO), and Momentum Alliance. These CBOs were selected due to their current connection with Metro. Interviews focused on identifying barriers when engaging with Metro and exploring new strategies to build long-term relationships.

The second phase included the review of two reports initiated by Metro's Parks and Natural Areas Program. The first report presents feedback from 12 CBOs that gathered and discussed the proposed framework for the department's new program, Partners in Nature (see Appendix F). The second report is a preliminary report generated by CIO that identifies the existing challenges expressed by 12 participating CBOs on building relationships with Metro (see Appendix F). This dialogue was an effort to identify obstacles for partnerships and ways the department can best work with CBOs. It should be noted that the use of this preliminary report helped avoid an overlap in research and approach to CBOs as the preliminary report and this research have common purposes.

Appendix K – Citywide Nonprofit Monitoring and Capacity Building Program – San Francisco, CA

City departments participating in the program, FY 2013-14

- Children and Families Commission (CFC)
- Department of Children, Youth & Families (DCYF)
- Department on the Status of Women (DOSW)
- Department of Public Health (DPH)
- Human Services Agency (HSA)
- Office of Economic and Workforce Development (OEWD)
- Mayor’s Office of Housing (MOH)
- Sheriff (SHF)
- Arts Commission (ART)

Criteria for department participation

- Must have a steering committee representative
- Representative is responsible for the department to complete:
 - Risk assessment information
 - Citywide monitoring scheduled and documented in the online dashboard
 - Monitoring Report Letters are issued to the nonprofit contractor and posted to the online data repository

Controller’s office role

- Provide policy recommendations and chairs the steering committee
- Responsible for training, quality assurance and reporting to senior managers on department performance

Best practices for departments

- Apply monitoring tools and standards consistently
- Include monitoring procedures and standards in the department’s manuals, performance evaluations and in staff orientation
- Include a copy of procedures and standards in the department’s contract boilerplate
- Use monitoring information in renewal or contract/grant award processes
- Identify training needs for department staff and non-profit contractors

Source: City and County of San Francisco. (2011). Citywide Fiscal & Compliance Nonprofit Monitoring Guidelines FY 13-14. San Francisco, CA: Controller’s Office

Appendix L– Additional leadership capacity building efforts

1000 Friends of Oregon’s Land Use Leadership Initiative (LULI) – Portland, OR

The leadership training program was established in 2012 and connects participants with leaders in the public, private and non-profit sectors. Topics of the training include: land use, gentrification, sustainability, and urban renewal, among other topics. Training runs from September to May and participants meet once a month for four hours. Program candidacy depends on time availability, interest in learning and willingness to work with a diverse cohort.

Website: <http://www.friends.org/landuseleadership>



Student Alliance Project (SAP) and Leveraging Momentum (LM) – Momentum Alliance Non-profit – Portland, OR

The SAP is targeted to traditionally under-represented youth ages 14-23 and encourages participants to become college graduates, public policy advocates and community organizers. LM is a leadership training that targets young leaders under 30 to become advocates, decision-makers, and leaders in policy.

Website: <http://momentumalliance.org/our-program/student-alliance-project/>



Developing Equity Leadership Through Training and Action (DELTA) – Oregon Health Authority, The Office of Equity and Inclusion

Training seeks to build the capacity of health leaders to eliminate health disparities. The training curriculum includes topics of health, cultural competence, engagement practices, and best practices for developing a diverse workforce, among other topics. Upon completion of the training, participants will engage in an individual health equity project to apply their skills learned. Cohort meets one day a month for nine months.

Website: <http://www.oregon.gov/oha/oei/Pages/DELTA.aspx>



Rainier Valley Corps – Seattle, WA

This organization helps refugee and immigrant communities by recruiting emerging leaders and providing them leadership training and capacity building. Once participants complete the training they are placed in community-based organizations on a full-time basis to develop their skills, all while helping CBOs carry out their missions. Under this model, there is a positive impact to CBOs while the communities' civic capacity is supported in the long-term.

Website: <http://rainiervalleycorps.org/about/>

Rainier Valley Corps

Additional Resources

Pew Partnership for Civic Change. (2002). *Crafting a New Design for Civic Leadership: A Pew Civic Entrepreneur Initiative Report*. Charlottesville, VA

http://www.civicchange.org/pdf/crafting_new_design.pdf

Appendix M – 1000 Friends of Oregon’s Land Use Leadership Initiative (LULI) 2014 curriculum

LULI Retreat (month 1)

A. Introduction

PHASE I: Elements of a city (month 2 & 3)

A. Land

- a. Urban growth boundary visit
 - i. Bob Stacey, Metro
- b. Natural Resource Preservation Centers
 - i. Merrill, Keane, Natural Audubon Society
- c. Brownfield
 - i. Maria Ellis and Noah S., Metro
 - ii. Cassie, Groundwork
 - iii. Bob Salinger
 - iv. Reynolds site and North site (site visits). Small neighborhood vs. large
- d. Parks & Pearl District natural spaces
- e. The process: zoning-commercial, residential, industrial

B. Air

- a. Traffic checkpoint, ODOT
- b. CBOS, ODOT
- c. Air Toxins
 - i. Anita Yap, Dave Nordberg, Maria Everhart
- d. Natural buffers for air pollution
 - i. Elizabeth Specht, BES
 - ii. Friends of Trees

C. Water

- a. Port of Portland
- b. Swan Island
- c. Bonneville Power Administration

PHASE II: Identifying the stakeholders (month 4)

A. Private sector

- a. Developers
 - i. Tiffany Sweitzer
 - ii. David & Albina Sideras
- b. Government
 - i. ODOT
 - ii. Metro
 - iii. TriMet
 - iv. PBOT
- c. Non-profit services
 - i. Fair Housing Council

- ii. Policy Link
- iii. Community Alliance of Tenants
- iv. Portland Development Commission

PHASE III: Issue spotting (month 5 & 6)

- A. Gentrification
 - a. PAALF
 - b. Urban League of Portland
 - c. Cully Neighborhood
 - d. Verde
- B. Urban sprawl
 - a. Metro
 - b. Wilsonville
 - c. Hillsboro
- C. Sustainability
 - a. Portland Bureau of Sustainability
 - b. Metro
 - c. Oregon Environment Council
- D. Unequal access to transit, education, parks and recreation, job opportunities, and cross-cultural experiences
 - a. OPAL Environmental Justice
 - b. Elders in Action
 - c. PAALF
 - d. Centro Cultural
 - e. Causa Oregon
- E. Ban on inclusionary zoning
- F. Environmental Hazards

PHASE IV: What are some potential solutions (month 7 & 8)

- A. Urban growth boundary
 - a. Bob Stacey, Metro
- B. Climate Smart Communities Scenario
 - a. Mary Kyle, Kim Ellis, Patty Unfred, Peggy Morell, Metro
- C. Long-term transportation planning
 - i. ODOT
 - ii. PBOT
 - iii. TriMet
 - iv. BTA
- D. Urban renewal/revitalization
 - a. Tiffany Sweitzer, Pearl
 - b. Carlotta Collette, Metro Council

PHASE V: Consequences of our actions (month 9)

- A. Now that the stakeholders have been identified, the systems described, the issues presented and the solutions that community

organizations/government agencies are creating, what are some consequences that the public can comment on?

- a. Do you think public forums are the best place for this?
- b. When should government leaders start asking questions?
- c. How should they reach out to your communities?
- d. What kind of issues do you feel most passionate about?
- e. Do any align with your organizations, studies, employment, volunteer experiences, or personal life?

PHASE VI: Land use toolkit: Fighting injustice/representing communities accurately (month 9)

- A. Campaign Organizing: What we can do now
 - a. Civic engagement 101
 - b. City Club of Portland
 - c. 1000 Friends of Oregon – creation of Advisory committee
- B. Public testimony
 - a. Learn how to comment using the knowledge of LULI
- C. Equity Atlas
 - a. Scott Ellis, Coalition of Livable Future
- D. Land use law 101
 - a. Ed Sullivan
- E. Know your rights, lobbying
 - a. Peggy McQuire, Affirmatively Furthering Fair Housing
 - b. Justin Buri, Community Alliance of Tenants
- F. How a bill becomes a law
 - a. Allisa Keny-Guyer, Representative
 - b. Earl Blumenauer, Bus Project

APPENDIX N – BIBLIOGRAPHY

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