



# Metro | Agenda

Meeting: Metro Technical Advisory Committee  
 Date: Wednesday, June 1, 2016  
 Time: 10:00 a.m. to Noon  
 Place: Council Chamber

Time	Agenda Item	Action Requested	Presenter(s)	Materials
10:00 a.m. 10 min.	<b>CALL TO ORDER</b>  <b>Updates from the Chair</b>		John Williams, Chair	
	<b>Citizen Communications to MTAC</b>		All	
15 min.	<b>2018 Regional Transportation Plan Update</b>  <i>Purpose: Provide a report on Leadership Forum #1 and next steps</i>	Informational	Kim Ellis, Metro	In packet
15 min.	<b>Equitable Housing Planning and Development Grants Update</b>  <i>Purpose: Update on the timeline and process for the Equitable Housing Grants</i>	Informational	Emily Lieb, Metro	In packet
15 min.	<b>Urban Growth Management Process Update</b>  <i>Purpose: Provide an update on the urban growth management process to-date</i>	Informational	Ted Reid, Metro	
30 min.	<b>Metro's Strategic Plan to Advance Racial Equality, Diversity and Inclusion – Update</b>  <i>Purpose: Present final draft of the plan to be approved by the Metro Council and request MTAC's support for the plan</i>	Informational / Recommendation	Patty Unfred, Metro Juan Carlos Ocaña-Chíu, Metro	In packet
Noon	<b>Adjourn</b>			

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## 2016 MTAC Tentative Agendas

<b>January 6</b> <ul style="list-style-type: none"> <li>Cancelled</li> </ul>	<b>January 20</b> <ul style="list-style-type: none"> <li>Housing Equity</li> </ul>
<b>February 3</b> <ul style="list-style-type: none"> <li>Cancelled</li> </ul>	<b>February 17</b> <ul style="list-style-type: none"> <li>Cancelled</li> </ul>
<b>March 2</b> <ul style="list-style-type: none"> <li>Urban Growth Management Update</li> <li>2018 RTP Update: 2016 Activities &amp; Milestones</li> <li>2018 RTP Update: Background for Regional Leadership Forum #1</li> <li>Metro Equity Strategy</li> <li>Title 13 Progress Report</li> </ul>	<b>March 16</b> <ul style="list-style-type: none"> <li>Growth Distribution</li> <li>Sherwood West Concept Planning work</li> </ul>
<b>April 6</b> <ul style="list-style-type: none"> <li>Cancelled</li> </ul>	<b>April 20</b> <ul style="list-style-type: none"> <li>Metro Equity Strategy Final Report</li> </ul>
<b>May 4</b> <ul style="list-style-type: none"> <li>Cancelled</li> </ul>	<b>May 18</b> <ul style="list-style-type: none"> <li>Cancelled</li> </ul>
<b>June 1</b> <ul style="list-style-type: none"> <li>2018 RTP Update</li> <li>Metro Equity Strategy</li> <li>Urban Growth Management Update</li> <li>Affordable Housing Grants Update</li> </ul>	<b>June 15</b> <ul style="list-style-type: none"> <li>Happy Valley CPDG Presentation</li> </ul>
<b>July 6</b>	<b>July 20</b>
<b>August 3</b> <ul style="list-style-type: none"> <li>2018 RTP: Background for Regional Leadership Forum # 2</li> <li>2018 RTP: Transportation Equity Priority Outcomes</li> <li>2018 RTP: Draft Regional Transit Vision</li> </ul>	<b>August 17</b>
<b>September 7</b>	<b>September 21</b> <ul style="list-style-type: none"> <li>2018 RTP: Draft RTP Performance Targets</li> </ul>
<b>October 5</b>	<b>October 19</b> <ul style="list-style-type: none"> <li>2018 RTP: Background for Regional Leadership Forum #3</li> </ul>
<b>November 2</b> <ul style="list-style-type: none"> <li>2018 RTP: Transportation Equity Measures</li> <li>2018 RTP: Safety Strategies and Outcomes</li> </ul>	<b>November 16</b>
<b>December 7</b>	<b>December 21</b>

### Parking Lot – Future Agenda Items

- Bonny Slope and North Bethany update
- ODOT Highway Performance Measures Project

### Parking Lot – Future Events

- Sept. 23, 2016 – RTP Regional Leadership Forum #2; Navigating our Transportation Funding Landscape
- Dec. 2, 2016 – RTP Regional Leadership Forum #3; Transforming our Vision into Regional Priorities

Getting there with a connected region



## 2018 REGIONAL TRANSPORTATION PLAN UPDATE

# Regional Leadership Forum 1 summary

## Exploring Big Ideas for our transportation future

The region is looking ahead to how our transportation system will accommodate future growth and change – and what investments we should make over the next 25 years to build a safe, reliable and affordable transportation system.

### What did leaders say?

*We need a bold vision for our future.*

*Planning and investment must benefit all families, businesses and communities.*

*We must grow the pie and spend tax dollars wisely.*

On April 22, 2016, the Metro Council convened more than 60 leaders from across the Portland metropolitan area to begin shaping a bold vision for the future of travel in the region. City, county, regional and state policymakers and business and community leaders came together to bring the perspectives of communities and constituents from throughout the Portland region.

These leaders offered their views on:

- current **big issues** around transportation
- emerging **big trends** that will affect future travel
- **big solutions** that can come from an update to the Regional Transportation Plan.



“All of us in the country and literally in the world count on [this region] to lead. And it is time... for you to challenge some basic assumptions... Big visions are what drive change.”

–R.T. Rybak, three-term mayor of Minneapolis

“First, abandon your script. Second, abandon your assumptions. I encourage you to replace them with empathy and curiosity.”

–Mychal Tetteh, CEO, Community Cycling Center



## Six key takeaways

### 1. Our region is growing and changing and so is the world around us.

New partners and innovation need to be part of shaping a shared vision for the future and defining how we work together to achieve it.

### 2. The region's transportation system is a shared experience and a shared responsibility.

Transportation is a top concern for most people, but we each have our own experience of getting around. Understanding these perspectives will help build a coalition to pursue a mix of investments and strategies that work together and accomplish multiple goals.

### 3. We need to define a bold vision for the future of transportation and the role it should play in our communities.

Transportation is not an end unto itself, but a means to an end. There's more to be done to communicate the value of investing in all parts of our transportation system.

### 4. Our transportation system must be inclusive and benefit all families, communities and our economy.

We need to take care of our existing system and invest in all travel options in ways that create an integrated system that is safe, reliable and affordable for all users.

### 5. Technology and data will be transformational and are key to a bold vision.

Our challenge is to figure out how we harness the connectivity and efficiencies technology can provide while ensuring that it doesn't make existing problems worse or leave some communities behind.

### 6. We need partnerships and leadership to create a great future.

We can build the future we want for our region. To keep it prosperous and moving, we need to work together to pursue more funding and embrace new voices and ideas.

## More information

News coverage and video footage of the forum are available at [oregonmetro.gov/snapshot](http://oregonmetro.gov/snapshot).

A report on the forum will be available in June 2016. Find out more about the 2018 RTP update at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).

## Getting there with a connected region



### 2018 REGIONAL TRANSPORTATION UPDATE

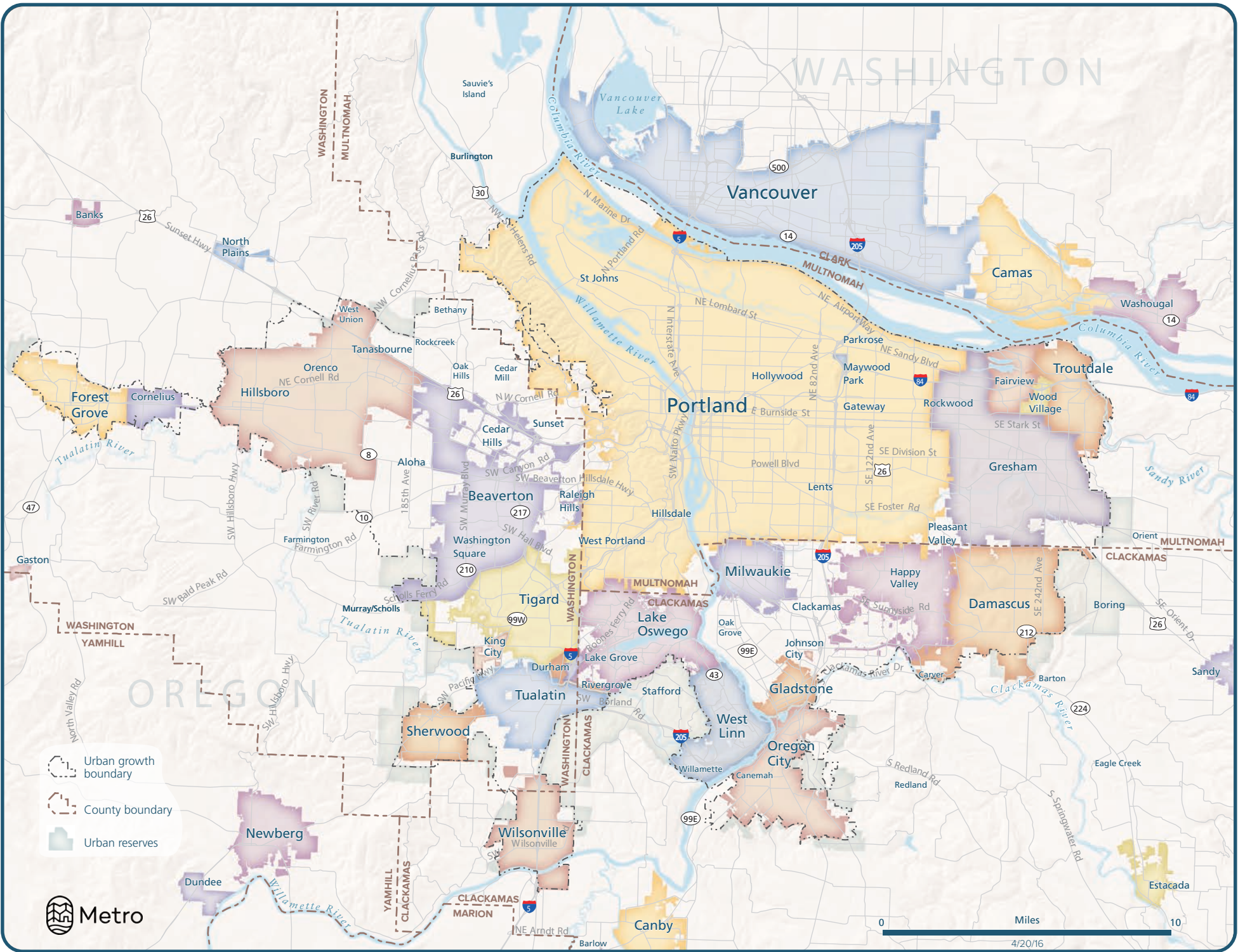
## Regional Leadership Forum 1 Report

### Exploring Big Ideas for our transportation future

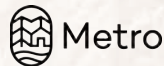
*A summary of the April 22, 2016 forum about the future of transportation in the Portland metropolitan region in support of the 2018 Regional Transportation Plan update.*

**May 25, 2016**





-  Urban growth boundary
-  County boundary
-  Urban reserves





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Getting there with a connected region



## 2018 REGIONAL TRANSPORTATION PLAN UPDATE

# Regional Leadership Forum 1 summary

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## Six key takeaways

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New partners and innovation need to be part of shaping a shared vision for the future and defining how we work together to achieve it.

### 2. The region's transportation system is a shared experience and a shared responsibility.

Transportation is a top concern for most people, but we each have our own experience of getting around. Understanding these perspectives will help build a coalition to pursue a mix of investments and strategies that work together and accomplish multiple goals.

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Our challenge is to figure out how we harness the connectivity and efficiencies technology can provide while ensuring that it doesn't make existing problems worse or leave some communities behind.

### 6. We need partnerships and leadership to create a great future.

We can build the future we want for our region. To keep it prosperous and moving, we need to work together to pursue more funding and embrace new voices and ideas.

## More information

News coverage and video footage of the forum are available at [oregonmetro.gov/snapshot](http://oregonmetro.gov/snapshot).

Find out more about the 2018 RTP update at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).

# Regional Leadership Forum 1 Report

## PURPOSE AND BACKGROUND

This report summarizes the discussions of the first of five Regional Leadership Forums that will be convened by the Metro Council in support of the 2018 Regional Transportation Plan update.

### 2018 Regional Transportation Plan update

Our region's economic prosperity and quality of life depend on a transportation system that provides every person and business with access to safe, reliable and affordable ways to get around.

The Regional Transportation Plan provides a shared vision and investment strategy that guides investments for all forms of travel to keep people connected and commerce moving throughout the Portland metropolitan region. The plan is updated every four years to stay ahead of future growth and address trends and challenges facing the region.

Our region is growing rapidly and straining our aging transportation system. A half-million new residents are expected to live in the Portland region by 2040. Our communities are becoming more culturally diverse, bringing rich cultural activity to neighborhoods. A new generation will grow to adulthood as others move toward retirement. Climate change is happening and our system is not prepared for the expected Cascadia Subduction Zone earthquake. We are experiencing technological changes in transportation that could radically alter our daily lives. Housing affordability and safe, reliable and affordable access to education, jobs and other important destinations are of concern.

The 2018 Regional Transportation Plan update provides policymakers, community and business stakeholders and the public with an opportunity to work together across interests and communities to bring innovative solutions to the challenges facing our changing region. It provides a platform for updating our shared vision for the transportation system and defining strategies and investment priorities to help ensure people and products get where they need to go as congestion, safety and maintenance issues increasingly impact our daily lives.

The 2018 RTP update is an opportunity to define how we will create a safe, reliable and affordable transportation system that is environmentally responsible, efficiently moves products to market, and ensures all people can connect to the education and work opportunities they need to experience and contribute our region's economic prosperity and quality of life.



*The region is looking ahead to how our transportation system will accommodate future growth and change – and what investments we should make over the next 25 years to build a safe, reliable and affordable transportation system.*

Find out more about opportunities to be involved in the 2018 RTP update at [oregonmetro.gov/rtp](https://oregonmetro.gov/rtp).

**#RTP2018**



## 2016-18 Regional Leadership Forums

To address the challenges and trends facing our region, the Metro Council is convening a series of five Regional Leadership Forums as part of the 2018 RTP update:

- 1 Exploring Big Ideas for Our Transportation Future** 4/22/16
- 2 Navigating Our Transportation Funding Landscape** 9/23/16
- 3 Transforming Our Vision into Regional Priorities** 12/2/16
- 4 Drafting Our Shared Plan for the Region** Fall 2017
- 5 Finalizing Our Shared Plan for the Region** Spring 2018

Forum participants will include members of the Metro Policy Advisory Committee (MPAC), the Joint Policy Advisory Committee on Transportation (JPACT), state legislators, and community and business leaders from throughout the Portland region. Working side-by-side, regional and state leaders will bring the perspectives of their communities and constituents to the conversation around the challenges we are facing, our vision for the future and potential solutions for moving forward.

## WHAT WE HEARD

On April 22, 2016, the Metro Council convened the first regional leadership forum, *Exploring Big Ideas for our transportation future*, at the Oregon Convention Center. More than 60 leaders from across the Portland metropolitan area begin shaping a bold vision for the future of travel in the region.

City, county, regional and state policymakers and business and community leaders joined in bringing the perspectives of communities and constituents from throughout the Portland region to the conversation.

These leaders offered their views on:

- current **big issues** around transportation
- emerging **big trends** that will affect future travel
- **big solutions** that can come from an update to the Regional Transportation Plan.

In addition to state legislators and members of MPAC and JPACT, participants included ten invited community leaders working in transportation advocacy, environmental justice, workforce equity, skilled trades and issues impacting older adults and ten invited business leaders from established firms, emerging businesses, business alliances and workforce partnerships. In all, more than 110 people attended the forum with 63 invited regional leaders and 50 general audience members.

**John Williams, Metro Deputy Planning Director**, facilitated the forum. A summary of the morning's opening remarks, featured speaker remarks and small group discussions follows.

### Opening remarks

**Wood Village Council President Tim Clark, Chair of the Metro Policy Advisory Committee**, recognized state legislators in attendance and thanked everyone for investing time to be part of the conversation that will set the region's direction on transportation investments for the next 25 years. He shared his excitement that the regional table has been expanded to include legislators and community and business leaders to help create a shared vision for our region's transportation system.

Chair Clark emphasized that success in the RTP update process hinges on how well we work together. He asked participants to be open to perspectives at the table they may not have considered before, to give everyone a chance to speak, and to embrace their leadership roles by

## What did leaders say?

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*Planning and investment must benefit all families, businesses and communities.*

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representing the interests of all their constituents in the discussion. He also challenged participants to take the opportunity during the breaks to introduce themselves to someone they haven't met before.

**Metro Councilor Craig Dirksen, Chair of the Joint Policy Advisory Committee on Transportation**, thanked everyone for participating in the forum and shared his excitement for beginning the two-year conversation that seeks to make the regional transportation planning process more connected and relevant to the people and businesses that rely on our shared transportation system.

He emphasized the importance of respectful dialogue in everyone's roles as leaders to give full attention to the issues that impact our communities and ensure everyone in the region has access to the quality of life that makes this place special. He acknowledged the community and business leaders at the regional table and the importance of actively engaging local, regional and community partners throughout the process.

**Mychal Tetteh, CEO of Community Cycling Center**, acknowledged how today's conversation is a wonderful way to kick off Earth Day 2016. He reflected that as we embark on the RTP update, everyone should consider what they need to carry on this journey, and what we might consider leaving behind. He provided two recommendations for the day: "First, abandon your script. Second, abandon your assumptions ... replace them with empathy and curiosity."

Mychal said, "If you do so, together we may position our region to make breakthroughs in transportation planning and implementation that may not be possible any other way." He expressed his hope that everyone can do more than just draw on their neighborhood, or constituent perspective and contextualize our work together in relationship to a world where the only constant is change. He acknowledged the forum as a new approach, stating, "Because this is a new approach to engagement, I don't want those of you who are all too familiar with regional government processes to be unprepared for the opportunity that awaits."

He challenged the group by asking, "What are you going to do to help make the world a better place today?"



*First, abandon your script.  
Second, abandon your assumptions. I encourage you to replace them with empathy and curiosity*

*- Mychal Tetteh, CEO,  
Community Cycling Center*

## Featured speaker

The forum was designed to foster leadership and collaboration and the theme was highlighted with featured **speaker R.T. Rybak**, three-term mayor of Minneapolis, recounting the familiar challenges of aging infrastructure, and citing the tragedy of the collapse of the Interstate 35W Mississippi River bridge during the evening rush hour in 2007, killing 13 people and injuring 145. Rybak challenged the crowd to step up into the leadership role the country expects from the Portland region and think boldly about transportation.

The challenges of changing needs and interests among different age groups, Rybak suggested, promote a new way of traveling that the Portland region is capable of addressing with our transportation options including a transit network, connected pedestrian walkways and bike paths, and shared ride services along with driving. Rybak characterized the region's transportation system as a "shared experience," urging leaders in the room to think about and engage all of the region's residents when thinking about the future to shape a common vision to drive the change that's needed.

Rybak emphasized the importance of making sure that the system serves all residents, and that its future is tied to helping people find affordable places to live and good jobs for work. He urged leaders to find ways to accommodate the growing interest of people with higher-incomes in living close to jobs and transit, while also protecting affordability and access for people with lower incomes.

Rybak shared the observation that transportation problems have a habit of holding up freight. Streets aren't safe enough for kids, commuters or seniors, he continued, adding that transit systems can't keep up with demand, or leave some areas underserved. It may seem that transportation problems demand transportation projects as solutions, he concluded.

But Rybak said leaders should approach transportation by seeing it as more than just moving people and goods from Point A to Point B. "We should never really be talking just about transportation," he said. "We should talk about the kind of communities we want to have," adding that it means leaders, advocates and others have to get beyond everyone fighting for their own share and their own projects. Diverse interests need to be willing to lay everything on the table – even "lock the door," as he put it, until a common vision can be hammered out. Big visions are what drive change, he argued, not fighting over every last penny in what he called a "culture of scarcity." He called out to the Portland region to step up to the challenge.



*All of us in the country and literally in the world count on [this region] to lead. And it is time...for you to challenge some basic assumptions...Big visions are what drive change.*

*- R.T. Rybak*



*When our region speaks about transportation...there is a focus on the Portland central city...and we know that what makes up the Portland [area] economy is a much more diverse set of workers and industries. I wanted to make sure the voices of those workers get represented in this process.*

*- Leigh McIlvaine, Oregon Tradeswomen, Inc. WANTO Project Manager*

## Key takeaways and summary of small group discussions

Following the opening remarks, leaders discussed top challenges and trends that should be addressed in the RTP update and potential solutions that could be incorporated into the plan to advance a safe, reliable and affordable transportation system in the Portland region. Six key takeaways and a summary of the small group discussions (*in italics*) follows.

### 1. Our region is growing and changing and so is the world around us.

New partners and innovation need to be part of shaping a shared vision for the future and defining how we work together to achieve it.

*Leaders recognized that a major transformation is under way, changing the way we will travel over the next 25 years, and that our solutions will need to shift with it. There was also common agreement on the problems and trends affecting the future of transportation in our region – congestion, safety, affordability, insufficient funding, aging infrastructure, technology, climate change, seismic resiliency, and changing demographics.*

*There was a recognition that there are real costs to the region if we don't invest in our future – costs to families, costs to businesses, costs to government – and costs to the State of Oregon.*

### 2. The region's transportation system is a shared experience and a shared responsibility.

Transportation is a top concern for most people, but we each have our own experience of getting around. Understanding these perspectives will help build a coalition to pursue a mix of investments and strategies that work together and accomplish multiple goals.

*Leaders discussed the need to maintain and protect our critical highways, bridges, local roads, and transit services, as these are the backbone of our economy, expressing that to do otherwise would be irresponsible and costly. From there, leaders felt we need to make sure we are operating our transportation system efficiently to ensure we make the most of the investments we've made and provide an integrated, seamless network to stretch taxpayer dollars.*

*In addition to keeping the existing system in a state of good repair, leaders discussed the need to continue investing in all options of travel – biking, walking, taking transit, carpooling, ride sharing services, driving and moving freight – as one seamless system with*



*all options contributing to the region's economic prosperity and quality of life.*

*Leaders talked about the need to break down the siloed-thinking that often positions one transportation mode against one another. Leaders acknowledged that a lack of funding and limitations on how existing funding can be spent has led to an emphasis on single solutions. Leaders understood that better transit service and making biking and walking safe and convenient will help increase road capacity for freight.*

*There was a recognition that siloed-thinking has also limited our ability to link housing and transportation goals related to affordability. Many leaders called for exploring new solutions related to funding projects in underserved communities, improving safety, use of technology and digital infrastructure, rethinking our streets and public space, making transit more affordable, reliable and time-competitive, and integration of new options such as on-demand travel services and trip planning tools to help ensure every person and business in the region has access to safe, reliable and affordable ways to get around. All parts of the transportation system, leaders agreed, need to work together regardless of jurisdictional responsibility or ownership.*

*Ideas suggested include:*

- fixing potholes and keeping the existing system in good condition;*
- building protected bikeways and complete streets to provide safe biking and walking routes to schools, transit and other destinations;*
- fixing bottlenecks on I-5, OR 217, and I-205, especially those affecting freight;*
- expanding transit coverage and frequency, including community and job connectors like GroveLink and connections between suburban communities;*
- integrating transit with technology and shared mobility services;*
- seeking opportunities to restructure freight distribution;*
- ensuring first/last mile connections to intermodal facilities and distribution centers;*
- using dedicated lanes for freight and multi-occupant vehicles;*
- pursuing the next level of demand management to increase the efficiency and optimization of existing system;*
- pursuing congestion pricing and tolling; and*
- retrofitting our bridges and transit system to withstand the expected Cascadian Zone earthquake and major storm events.*



*The biggest issue I am hearing about is congestion spilling off I-5...It really validates the Climate Smart Strategy that we all coalesced around, including investment in increased transit services - especially around the suburban to suburban outer ring of the region.*

*- Mayor Knapp, City of Wilsonville*



*It is our job to advocate for those who are needing a voice in our community, both communities of color, individuals living in poverty, individuals who are having a challenge making the next step and also make sure we are advocating for our business and making sure they have the right talent. Sometimes transportation is the biggest barrier from both perspectives.*

*- Bridget Dazey, Executive Director Clackamas Workforce Partnership*

### **3. We need to define a bold vision for the future of transportation and the role it should play in our communities.**

Transportation is not an end unto itself, but a means to an end. There’s more to be done to communicate the value of investing in all parts of our transportation system.

*Leaders talked about the importance of having a bold vision for the region’s transportation system and the need to work together to define how to achieve that vision. Leaders expressed the need to come together around a shared vision that considers: a transit system that’s fit for the future and connects people to the places they need to go; a freeway network that’s safe, reliable and well-managed; a regional system of trails and streets that keeps everybody safe on foot, on a bike, and in a car, bus or semi-truck; freight systems that keep our region and ports competitive; and a and streams and is refitted to keep our bridges standing after an earthquake.*

*Leaders shared many ideas about possible sources of funding, recognizing that we can’t continue carving up the same limited funding pie and that, instead, we need to work together to “grow the pie.” Ideas suggested include: user-based fees, increased gas tax and vehicle registration fees, congestion pricing, tolling, vehicle mile traveled fee, sales tax, and a regional transportation ballot measure.*

*There was a shared recognition that we have work to do to build public trust that any new funding would be spent wisely. By demonstrating the benefits in a cohesive vision of a better connected future, leaders suggested, the public may be more willing to finance the ever-increasing infrastructure needs of today and tomorrow. Some leaders offered that increased funding and investment should be coupled with prioritizing investments that achieve the mix of economic, social and environmental outcomes called for in the RTP.*

### **4. Our transportation system must be inclusive and benefit all families, communities and our economy.**

We need to take care of our existing system and invest in travel options in ways that create an integrated system that is safe, reliable, and affordable for all users.

*Leaders discussed the importance of applying a social equity lens to planning and investment decisions to help:*

- *ensure our decisions take into account the benefits and impacts to low-income communities, communities of color, youth, older adults and people living with disabilities*
- *maximize access to opportunity (e.g., jobs, school and services) and growing communities around transit without displacement*
- *link our transportation, community design and housing goals related to affordability and access to opportunity to make progress on all three, such as connecting low-income families to middle-income jobs*
- *expand shared on-demand mobility options and trip planning tools to serve all communities and individuals – across age, race, gender, geography, and income-level.*



## 5. Technology and data will be transformational and are key to a bold vision.

Our challenge is to figure out how we harness the connectivity and efficiencies technology can provide while ensuring that it doesn't make existing problems worse or leave some communities behind.

*Leaders called out how technology and data are driving the transportation conversation, our policy making and how we will travel in the future. Smart cities (e.g., cities that integrate multiple data and communication technologies to meet transportation needs), connected and driverless vehicles, Big Data, personal technology devices, freight delivery and shared mobility services (e.g, Uber and Lyft) were among the topics identified by leaders. Discussions spotlighted how we can use data to change the way we get around, deliver services, and make investment decisions. Data and technology, leaders proposed, will help us reach our transportation goals, improve the quality of our neighborhoods and allow us to think smarter, finding more innovative and creative solutions to some of our most pressing challenges. Leaders also discussed the importance of ensuring that new technology doesn't make existing problems worse or leave some communities behind.*

*We have some pretty bold visions...but we don't have the ability to meet those with our current funding allocation. [O]ur own growth and success is starting to catch up and we don't have the money to stay ahead of that.*

*- William Henderson,  
Portland Independent  
Chamber of Commerce*

## 6. We need partnerships and leadership to create a great future.

We can build the future we want for our region. To keep it prosperous and moving, we need to work together to pursue more funding and embrace new voices and ideas.

*A recurring theme in the table discussions was that keeping up with growth and building the future we want for the region requires us to think big, spend money more strategically to accomplish multiple outcomes, and build more consensus across diverse interests and perspectives on what the solutions are in the short and long-term.*



Many agreed that all interests should be at the table to share their perspective and that understanding those perspectives will help build a coalition to pursue the funding, investments and strategies that are needed to address the region’s many transportation needs.

### Regional Snapshot Series

To reinforce the value of bringing local and personal experiences to the conversation in order to learn from each other, three videos clips were shown throughout the forum from Metro’s Regional Snapshot Series.



The full series of videos and stories and statistics on the experiences of residents and businesses and how they get around the region can be viewed at [oregonmetro.gov/snapshot](http://oregonmetro.gov/snapshot).



For more stories and stats about our changing region, visit [oregonmetro.gov/snapshot](http://oregonmetro.gov/snapshot)

*I’m interested in what happens not only in our community but also what happens regionally. If we don’t get it right regionally, it doesn’t matter how good we are in our particular city.*

*- Councilor Jeff Gudman, City of Lake Oswego*

### NEXT STEPS

There is strong support for our shared transportation system and clear focus on the need to maintain the system we have today, address congestion, link our housing, transportation and workforce goals, meet seismic needs, and make appropriate investments in our system of highways, streets, transit, and biking and walking routes. Leaders recognized this forum was the beginning of many conversations on how to do that important work together with new voices and partners at the table.

The next forum is scheduled for Sept. 23, 2016 and will focus on funding. Find out more about upcoming opportunities to be involved in the 2018 RTP update at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).

# **Regional Leadership Forum 1 Report Attachments**



Getting there with a connected region



## 2018 REGIONAL TRANSPORTATION PLAN UPDATE REGIONAL LEADERSHIP FORUM 1

# Exploring Big Ideas for our transportation future

8 to 11 a.m., Friday, April 22, 2016  
Oregon Convention Center, Rooms F149-152

### THREE REASONS TO ATTEND

Decision makers,  
and community  
and business  
leaders – all at the  
same table

Our success hinges  
on how well we  
work together.

### The place for bold thinking

National, state and  
local leaders bring  
their insights to  
the discussion.

### Opportunity to help create the future you want

Five forums over  
two years to  
shape, direct and  
lead change.

7:30 a.m.

Registration, light breakfast and networking

8 a.m.

Welcome and morning overview

John Williams, Metro Deputy  
Planning Director

Wood Village Council President  
Timothy Clark, MPAC Chair

Metro Councilor Craig Dirksen,  
JPACT Chair

Mychal Tetteh, CEO  
Community Cycling Center

8:20 a.m.

### Featured speaker

#### More than just Point A to Point B

Building great communities, boosting  
economic prosperity and ensuring quality of  
life through transportation investments

R.T. Rybak  
Three-term mayor  
of Minneapolis

Followed by Q&A

9:10 a.m.

#### Big Issues

- *What is the one Big Issue around transportation that you hear about most from your constituents or community?*

Small group discussion

#### Big Trends

- *Picture the region 10 years from now, what Big Trends will affect future travel and how?*

9:50 a.m.

#### BREAK

10:05 a.m.

#### Big Solutions

- *Viewing the RTP as a tool for change, what Big Solutions should be considered in the 2018 RTP update?*

Small group discussion and  
report out (pitch your Big  
Solution)

10:55 a.m.

#### Next steps

John Williams

11 a.m.

#### Adjourn

## Featured speaker

**R.T. Rybak**, former three-term mayor of Minneapolis, served from 2002 to 2013. During his time in office, Rybak led efforts in economic development, affordable housing, transportation and youth violence prevention. Rybak will share his experiences leading a diverse metropolitan area and responding to the collapse of the I-35W Mississippi River Bridge that was rebuilt to expand travel options in his community.



When he left office, Minneapolis had restored its AAA bond rating, enjoyed the lowest unemployment in the country and put 20,000 young people through the STEP-UP summer jobs program he founded.

He is currently serves as executive director of Generation Next, a coalition of civic, business and school leaders focused on closing the educational achievement gap for children of color in Minneapolis and Saint Paul. His goal through this work is to make Minneapolis and St. Paul a national leader in innovative, cradle-to-career approaches to youth development, and to highlight the crisis of our region's achievement gap and advance effective strategies for ending it.

Rybak is the author of the just released "Pothole Confidential" about his 12 years as mayor of Minneapolis. Rybak also serves as a Vice Chair of the Democratic National Committee and as a Senior Advisor for Municipal Practice at Living Cities.

A Minneapolis native, R.T. Rybak spent almost 30 years working in journalism, the commercial real estate business, publishing and the Internet before being elected mayor in his first run for public office. He and his wife Megan O'Hara, have two grown children.



Regional Leadership Forum #1 | Small group discussion participants | April 22, 2016

**TABLE 1:**

1. Bernard, Jim (MPAC, Clackamas Co.)
2. Burkman, Jack (JPACT, City of Vancouver)
3. Chase, Sam (MPAC Liaison, Metro Council)
4. Freeman, Rob (Fred Meyer Clackamas)
5. McFarlane, Neil (JPACT, TriMet)
6. McIlvaine, Leigh (Oregon Tradeswomen, Inc.)

*McTighe, Lake – table captain*

**TABLE 2:**

1. Bartlett, Bruce (Washington County community member)
2. Bergsma, Hal (AARP)
3. Doss, Camron (Portland District SBA Director)
4. Doyle, Denny (JPACT, 2nd Largest City in Washington Co.)
5. Jones, Dick (MPAC, Clackamas Co. Special Districts)
6. Salz, Aly (Righteous Clothing)
7. Treece, Pam (Westside Economic Alliance)

*Dobson, Noelle – table captain*

**TABLE 3:**

1. Collette, Carlotta (MPAC Liaison, Metro Council)
2. Eiland, Jill (Intel)
3. Hayes, John (MPAC, School Districts Rep.)
4. Lahsene, Susie (JPACT, Port of Portland)
5. Monroe, Rod (Senator; District 24 – E. Portland/N. Clackamas Co.)
6. Novick, Steve (JPACT, City of Portland)
7. Schlosshauer, Kari (Safe Routes to School National Partnership)

*Perrault, Ramona – table captain*

**TABLE 4:**

1. Cardwell, Gary (NW Containers)
2. Reardon, Jeff (Representative; District 48 – Happy Valley)
3. San Soucie, Marc (MPAC, 2nd Largest City in Washington Co.)
4. Savas, Paul (JPACT, Clackamas Co.)
5. Stacey, Bob (MPAC Liaison, Metro Council)
6. Stober, Ty (MPAC, City of Vancouver)
7. Tetteh, Mychal (Community Cycling Center)

*Deverell, Colin – table captain*

**TABLE 5:**

1. Brent, Syni (RPM Mortgage)
2. Dazey, Bridget (Clackamas Workforce Partnership)
3. Gamba, Mark (MPAC (1st Vice Chair), Other Cities in Clackamas Co.)
4. Grover, Bob (Pacific Landscape Management)
5. Hughes, Tom (Metro Council)
6. Kransky, Gerik (Bicycle Transportation Alliance)
7. Lininger, Ann (Representative; District 38 – SW Portland, Lake Oswego)

*Zucker, Ina – table captain*

**TABLE 6:**

1. Craddick, Shirley (JPACT Liaison, Metro Council)
2. Dembrow, Michael (Senator; District 23 – SE/NE Portland)
3. Newberry, Skip (Technology Association of Oregon)
4. Rall, Chris (Transportation For America)
5. Willey, Jerry (MPAC, Largest City in Washington Co.)
6. Windsheimer, Rian (JPACT, ODOT)

*O'Brien, Tim – notetaker*

*Snook, Jamie – table captain*

**TABLE 7:**

1. Bogue, Emerald (MPAC, Port of Portland)
2. Collier, Corky (Columbia Corridor Association)
3. Dirksen, Craig (JPACT Chair, Metro Council)
4. Hastings, Chad (CenterCal Properties)
5. Hovies, Gordon (MPAC, Washington County Special Districts)
6. Knapp, Tim (JPACT, Cities in Clackamas Co.)

*Ursin, Nikolai – table captain*

**TABLE 8:**

1. Clark, Tim (MPAC Chair, Other Cities in Multnomah Co.)
2. Gudman, Jeff (MPAC, 2nd Largest City in Clackamas Co.)
3. Harrington, Kathryn (JPACT Liaison, Metro Council)
4. Hashagen, Ryan (Better Blocks Portland)
5. Henderson, William (Knock Software)
6. Satterfield, Vivian (OPAL Environmental Justice Oregon)
7. Truax, Pete (MPAC, Other Cities in Washington Co.)

*Cho, Grace - notetaker*

*Ellis, Scotty – table captain*

Regional Leadership Forum #1 | General audience attendance list | April 22, 2016

1. Tom Armstrong
2. Becky Bodonyi
3. Dan Bower
4. Karen Buehrig
5. Alice Cannon
6. Brad Choi
7. Carol Chesarek
8. Chris Deffebach
9. Jeff Dahlin
10. Rob Dixon
11. Denny Egner
12. Lori Figone
13. Judith Gray
14. Bill Holmstrom
15. Brendon Haggerty
16. Chad Hastings
17. Eric Hesse
18. Jim Hagar
19. Robert Hillier
20. Heather Koch
21. Karla Kingsley
22. Katherine Kelly
23. Mary Kyle McCurdy
24. Steve Kountz
25. Alan Lehto
26. Mauricio Leclerc
27. Stephan Lashbrook
28. Jon Makler
29. Zoe Monahan
30. Don Odermott
31. Alex Page
32. Cora Potter
33. Mark Ottenad
34. Jeannine Rustad
35. Matt Ransom
36. Bandana Shrestha
37. Gary Schmidt
38. Clay Veka
39. Joanna Valencia
40. Elaine Wells
41. Jonathan Schleuter
42. Jeff Hamm
43. Todd Juhasz
44. Deanna Palm
45. Steve Williams
46. Jason Hitzert
47. Jason Gibbons
48. Adam Barber
49. Jessica Berry
50. Andrea Hamburg
51. Craig Ward



**4/22/16 Regional Leadership Forum  
Table Notes from Small Group Discussions**

**Question #1 | BIG ISSUES**

Describe the one Big Issue – or transportation challenge – that you hear about most from your community or constituents?

**Table 1**

- Digital divide
- Equity issue
- Plans that we make serve workforce equitably
- Maintaining and taking care of what we have
- Can never build enough to resolve the problem
- Lack of connectivity – bike, ped, transit
- How we work with partners at state – how we get citizens to invest more
- Congestion, road maintenance and funding. How we communicate with the community to get them to invest more.
- Congestion – 14 miles 1.5 hrs. Single biggest issues – safety and interaction between trucks, bikes, etc. Issue because of coast – labor, extra fuel effects ability to serve customers
- Rose Quarter and I-5 Bridge
- Seismic resiliency - resilient transit and transportation system; climate change – Big weather; infrastructure maintenance.
- Access to jobs – manufacturing – construction – not always accessible by transit. Transit/job mismatch for low-income women. Voices of low-income people not included.
- Impacts to low income communities – cost to these populations need to include housing and equity issues.
- Split between urban and rural communities – TRUST – for funding and to get projects done.

**Table 2**

- Think from consumer perspective.
- Small business population increase stresses the system, now to future.
- Clackamas County business – 35 employees has ↑ commute time and ↓ reliability – flex to offer options.
- Alternative modes for seniors, safety and getting to transit.
- Oak Lodge Ride Connect – first mile last mile solutions – not just for transit but for commuters. Grove link is a good example.
- Cost of congestion – what does it cost all of us? Conflicts between modes of transportation. Not a zero sum game.
- Congestion. Hearing for 20 years – “Why don’t we build more roads?”
- Parking in neighborhoods.

- Lack of education about the cost of congestion and the link between urban congestion issue with others around the state.

### Table 3

- Moving product – businesses struggle.
- School funding vs. transportation funding; congestion = loss of business = less \$ for schools; inter-related.
- Better transit would increase capacity for freight; highways need to work for freight.
- Want to walk/bike to school, but not safe and getting kids to school safely AND congestion – no \$\$\$.
- Getting workers to work – transit hasn't kept pace.
- Congestion/safety/parking.

### Table 4

- Can't just solve freight: how to address all parts of the system.
- Need to be multi-dimensional; balance; community; walkability.
- Congestion x3; highways; planning life around commuting.
- PDX rail. Model is broken for freight; destination and export location; inefficiency; co-locating.
- Congestion x3 big @ local table. Product through PDX. Emerging hwy. Capacity; outgrown system.
- Need all of the above; focusing on the scraps of funding has over-emphasized single solutions; we need to expand the pie to address all needs.
- Congestion; vision zero; big ideas with small impact; incentives; safety.
- Suburban to suburban transportation; new Columbia River crossing.

### Table 5

- Industrial mix in Tualatin; freight on roadways, bring workforce in; government creates a better plan; need more leadership.
- Safety – safe streets – home → protected lanes – designated routes.
- Transportation is #1 challenge in getting to living wage jobs; getting around the region.
- Congestion growing; no current plan to relieve that; hard to move freight without going into Portland.
- Perspectives: a) Local – potholes; can't walk to grocery stores – too dangerous; b) Cost of housing rising – even for solid wage earners – affordability – “Drive to qualify” – live further from work; takes too long to get places.
- Congestion – not so bad depending how measured; safety.
- Less time with family because in traffic; childcare cost is so high; education will suffer – ripple effect; shouldn't silo transportation.
- Transportation doesn't get sufficient funding – maybe gas tax ↑.

### Table 6

- Education/communication/media current on benefits of alternatives.
- Getting people to and from work – productivity loss.
- Mobility for seniors (Health impacts from highway).
- Blend of mobility – getting to work, freight reliability for shipping time sensitive.

- Transit access to industrial areas and congestion.
- Safety
  - Who owns street
  - Housing issue – affordable.
- Congestion – keep freight/people moving.
- Frustration with congestion → safety issues.
- Think different about transit/technology imp.

**Table 7**

- Collective system approach to congestion management – new approach to transit that does not always head downtown; better serves suburbs.
- Congestion – restricting economic growth.
- Appropriate balance of modes.
- Truck traffic on highways growing due to Terminal 6 issues.
- Getting low wage people to shopping centers to fill jobs available/reactive to transportation problem rather than proactive.
- Designing safety within street system – often impedes truck traffic.

**Table 8**

- Congestion and traffic
- Funding; impact on infrastructure; maintenance; improving/enhancing what we have.
- Safety; travel differently throughout the day.
- Parking; affordable housing.
- Housing affordability, transportation options, jobs access, internet. Transportation choices across economic spectrum.
- Funding; affordable housing; transportation options.
- Affordable housing; access to jobs.

**Question #2 | BIG TRENDS**

Picture the region 10 years from now. What **Big Trends** will affect future travel and how?

**Table 1**

- Don't fail first then fund.
- Technology trends – Uber, connected vehicles. Autonomous vehicles. Equity implications
- GIS auto routing around congestion – into neighborhoods. Partnered with companies such as Lyft. Integrated payment platforms.
- Different use of the transportation system.
- Push back on “subsidizing” transit – need to show that driving is subsidized, including where we subsidize and how we subsidize.
- Older demographic wants roads/cars; younger demographic – less interest in driving.
- People looking for transportation options.
- Growing business and growing population – growing need to move more freight.
- Hard to get freight across I-5/Columbia.
- Internet industry taking the place of brick and mortar – e.g. ordering groceries online, use of the internet.
- Employees needing to move around.
- Affordability to housing – transportation connection.
- Fear that we are going to lose our economy – freight fear.
- Demographic – geographically.
- Suburbanization of poverty decentralization of people that need services.
- Public and private partnerships – natural alignment
- Integration of apps, technology and different modes.

**Table 2**

- Some people feel like they (have) advantages, but other communities don't.
- Discussion about whether we can bring whole state along or region needs to do it “alone.”
- Driverless cars; other technology – don't have to be there in person to participate.
- Washington County has built trust, good use of \$, repair work contrast with City of Portland.
- Washington County – all cooperate, courageous politicians.
- PERS, general fund shortage – statewide transportation is low priority.
- Clackamas County feels why are we paying for something in Washington County.
- Last mile first mile.
- People are lazy – won't walk ½ mile.
- Climate refugees.
- Rural areas getting goods to market.
- Land use solutions improve quality of life for seniors.
- Diverse, older communities.



- Fast growing Hispanic population living in places without affordability of housing and transportation infrastructure.
- Diversity of regional communities, not just racial diversity. Diversity geographically different from Portland.
- Not recognizing all different types of communities.
- Negativity about roads versus trails.

### Table 3

- Busses and trucks moving to clearer fuels (natural gas, propane, electric).
- Leadership being squashed by ballot and referendum.
- Last – mile connectors – small vans, buses, jitneys, etc.
- Sharing economy/flexible economy.
- Changes in moving freight = alternatives – Uber for freight!
- Technology causing changes to freight and all transportation.
- Cleaner, quieter vehicles may spur development closer to busy roads and highways.
- Question: Equity issue; some new technology will be affordable, some will not!
- Question: How will we pay to keep Willamette bridges in the earthquake?
- Problem: Analysis paralysis.

### Table 4

- Transportation is contextual – jobs and personal needs (food, employment, safety) harm/withering economy due to lack of mobility – turned into poverty with weak mobility – businesses are increasingly focused on transportation constraints.
- Quality of life – tech companies drive up cost of living, but also not needing the same transportation access.
- Understand broader challenges in terms of transportation density and sprawl having different effects – property value increases and displacement.
- Trend of on-demand services/privatization - is the system responding? Online ordering continued inability to internalize external costs - private sector response is Uber/Lyft, etc. to a system that's not working.
- Assumption that road expansion is as solution to growing congestion?  
Telecommuting
- Trend to autonomous vehicles – implication for freight capacity – technology will make huge splashes; signals, cars, transit, technological innovation – more localized.
- Lack of leadership – connectivity – scatter shot development has fragmented system and induced demand - region cannot wait for state and federal.
- Cheap power and water; demographics and economic development implications – land use: Clark County growing like crazy along I-5 to Woodland.
- Central City economic development impacts commuters travel costs in Washington State.
- Increase in gas tax and user fees can help.

### Table 5

- Smartphones for maps, bikes, ridesharing, parking spots – use phones to give mode options; private sector is important.
- Technology - Tesla Model 3 – \$14B sold in one week.
- Hope for future

- Better predictability on local projects to get funded.
- When there were federal earmarks.
- Technology and young people – different ways of communicating and being political online.
- More community for young people – kids who lived through recession, better at sharing resources, multi-purposing.
- Rethink how we pay for transportation –
  - All modes, all sources.
  - Sell the vision.

**Table 6**

- Technology
  - Autonomous vehicles.
  - How does the infrastructure catch up?
- More travel options to allow access to other modes.
- Increased access to information.
- Population increase → demographic changes. Providing options for families.
- Funding needs cooperation from all sectors and needs alternatives to fund future improvements.

**Table 7**

- Internet commerce growing and its impact on transportation.
- Less predictable commute patterns because of housing affordability and employment opportunities outside downtown core.
- Technology bringing down cost of transportation (electric cars).
- New residents are influencing transportation system.
- Better information on congestion/gas to influence transportation choices.
- Growing freight movement as economy improves.

**Table 8**

- Automated vehicles; system-wide.
- Technology and network efficiency use; beyond what we know and use today → build into system and for user. Are work groups talking about this? Elected to talk more openly about the role of technology.
- Existing system is not as adaptive to disruptive technology.
- Rethink technology on other systems and how they will interact with the next big idea/disruption (transit strategy).
- Technology as the travel information tool → tell which mode you use.
- Role of government and regs access to info!
- Transportation system as more flexible and adaptable.
- Diversity of/for/the system.
- Demise of transportation monoculture.
- We are all in this together – COMMON GROUND.
- Broadband infrastructure.
- Metrics, measures and performance – common ground – data to drive/inform trends. Common ground.
- Driver behavior → design and other features to change travel behavior.

- Changing demographics. Making decisions around understanding the differences of people.
- Tech moving into private/proprietary systems.
  - Concern governments cannot influence.
  - Government regulatory role.
- Displacement.
- More sensory imbedded infrastructure for data collection.
- Understand all the tools available; understand each other.
- Freedom on Information Act (FOIA) should/has to be a two-way street.

**Question #3 | BIG SOLUTIONS**

Viewing the RTP as a tool for change, what **Big Solutions** should be considered in the 2018 RTP update?

**Table 1 Big solutions poster**

1. Break down silos between modes – all in it together – framing projects as community projects – equity.
2. Break down silos between housing and transportation-related problems and related solutions.
3. Dedicating parts of the system to freight starting with freeways.
4. Middle transit – the “collectors” of the transit system.

**Table 1 additional notes on Big Solutions**

- Between transportation user groups – complete projects – multi-modal focus balance between user groups.
- Break down silos – community projects = big projects with equity hardwired in
- Frame projects as community projects and turn this into a strategy of building an equitable community – bring more than just transportation tools.
- More people using transit to free up roadway space for trucks.
- Explore bringing technology together to address equality.
- Big funding strategies for transportation.
- Integrate strategies for housing and equity – related problems need related solutions.
- Dedicate lanes to freight.
- Develop structure – two state – legal authority to make decisions.
- CRC for freight – Dedicated freight lanes; truck and light rail bridge. Build more or get existing cars off the road. Can’t build yours way out of congestion.
- Get people to live closer to their jobs.
- Middle transit – regional system “collectors” of transit.

**Table 2 Big solutions poster**

1. Spend \$ on technological solutions – system can work better or won’t have to travel at all.
  2. Non-financially constrained RTP – aspirational leadership. THINK BIG.
  3. Funding for first mile – last mile, like Forest Grove link.
  4. Package of small solutions (filling the gaps) / big solutions.
  5. Policy – jurisdictional agreement/cooperation on geog/area of overlap.
  6. Safer bike; ped infrastructure, trails; providing recreational space within residential areas / increased prominence in active transportation plan.
  7. Tolling – i.e. supporting to market – New Jersey dedicated freight lanes, dedicated toll lanes.
  8. Accept that we’re going to bother/inconvenience people, i.e. tunnels, west-side bypass.
- (Side comment): No idea is a bad idea.

**Table 2 notes on Big Solutions**

- Local responsibility, but don't ignore the state.
- Tie solutions to projects, benefits.
- Show accountability and public trust in spending \$ where you said you were going to spend it.
- Flex schedules.

**Table 3 Big Solutions poster**

- Set goals, propose projects, then get \$.
- Common understanding of the problem (listen to the consumer).
- All stakeholders at the table – create package.
- Consider new funding sources.

**Table 3 additional notes on Big Solutions**

- We need funding! Prioritize transportation funding and what the projects will be.
- Analysis paralysis.
- Delivering products voters still support again and again.
- Too many coalitions, not enough product.
- Sales tax? At polls.
- Gas tax? Losing proposition due to electric vehicle registration fees and hybrid cars.
- User fees? Still have constitutional problem/limit on \$ raised → VMT → congestion pricing.
- Grant and foundation funding? Smart city grant, for example.
- Come up with list of projects voters will support.
- Regional tax and/or fee?
- Cannot just continue carving up the same funding. If you pay for bikes, you are not paying for something else.
- Increasing road capacity by getting people off the roads through sidewalks, bike lanes and transit.
- Building coalitions.
- Show leadership and raise funding!
- Government investing in technology research (federal Smart Cities Challenges grant).
- Think about what the consumers want.
- Connecting institutions of learning with transit.

**Table 4 Big Solutions poster**

- Manage and invest in mainline system.
- Next-level demand management.
- Restructure freight distribution.
- Funding:
  - Communicate the vision
  - “Grow the pie”
  - Investment in technology

**Table 5 Big Solutions poster**

- Build more protected bike infrastructure and trade in cars for electric bikes.
- Progressive tax on transportation users no matter what type of transportation/mode to fund all modes \*(WITT)
- Triple bottom line analysis on building new projects.
- Toll new roads – pay for convenience/speed.
- Regional tax for transportation.

### **Table 6 Big Solutions poster**

- Funding – all options/possibilities.
- Education and awareness.
- Expand freight system – new ideas.
- Improve last mile/park and ride.
- 3 categories for RTP:
  - Freight
  - Impact to employment
  - Public access

### **Table 6 additional notes on Big Solutions**

- Segment RTP
  - Freight
  - Commute
  - Access - transit
- Funding – open world of possibilities for funding transportation (sales tax) local/regional/state; not just gas tax – VMT.
- Public/private partnership.
- Bringing people together from all parts of the state to learn from each other.
- Raise consciousness of risk to system.
- Alternative freight solution.
- Funding
  - All options
  - VMT
  - The viability of funding options
  - Education
- Common understanding.
- Stimulate the use of freight rail; expanding freight rail system.
- Senator Dembrow to share information about information sharing.
- Education and awareness (3 segments of the RTP):
  - Freight
  - Impact on employment
  - Public (transit)
- Last mile.
- Middle transit – HCT, not radial, electric buses, bus lines.
- Alternative funding sources.
- Privately funded infrastructure.
- Car flooding.
- Ride sharing.
- Getting the word out

- Education
- Communications
- Media coverage.

**Table 7 Big Solutions poster**

- Additional I-205 southbound connection to I-5.
- Congestion management thru tolling.
- Build the complete RTP – highway capacity, HCT, system connections.
- Connect between suburban communities (beyond hub and spoke to downtown transit).
- Target strategic bottlenecks.
- Columbia River Crossing.
- Connect low-income neighborhoods to middle-income jobs.

**Table 8 Big Solutions poster**

- Open data policy.
- Proactive, user-technology on-demand travel options/choice tool.
- Increased efficiency/optimization of existing system.
- Free public transit.
- HOV – Multi-modal (freight, transit, multi-occupancy).
- Complete the gaps & build new connections (ATP).
- Minimum safety/network.
- Congestion/decongestion pricing.
- Intentional/consistent/purposeful on collaborating (summits/Regional Leadership Forums).
- Acknowledge the livability/economic intersection and integration.
- Partnerships and relations.
- Regional investment – facilitates collaboration.
- Education around the big issues to make less fearful or humanizing.

**Table 8 additional notes on Big Solutions**

- Proactive, user, technology, travel option/choice tool on-demand.
- Or go big.
- Try little things and let's see how they go.

# Regional Snapshot

# TRANSPORTATION



Access to transportation options that are safe, reliable and affordable is essential to the Portland metropolitan region's economic prosperity and quality of life.

Here's a look at where we are now.

## The daily commute

**7.1**

Average commute in miles

**26**

Average commute in minutes

**7** out of **10** commuters drive alone



## Safety

**57**



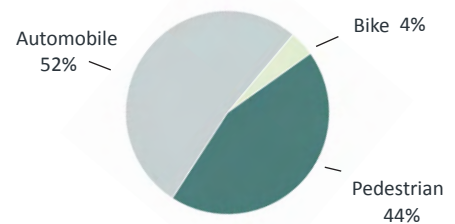
Percentage of fatal crashes where alcohol or drugs were a factor

*"(Safety) impacts every one of us, and it's something that we can do something about."*

-Don Mitchell, ODOT

**48**

Percentage of fatal crashes involving people walking or biking.



Total Traffic Fatalities by Mode 2010-2014

## Reliability



People with low incomes are more likely to need non-car transportation but 23% have no access to transit.

*"The greatest barriers to the use of public transportation are **time** and **reliability**. If people can't count on transit to get them there at a specific time, they're not going to use it."*

-Adria Decker Dismuke, Milwaukie resident

## Affordability

**\$1.9 Billion**



Annual cost of traffic crashes to our region



**\$8,698**

Annual cost to own & operate a vehicle



**\$1,100**

Annual transit pass

**20**

Average percentage of income spent on transportation



For more information and the rest of the story, visit: [oregonmetro.gov/snapshot](http://oregonmetro.gov/snapshot)





## 2018 Regional Transportation Plan

*Metro brings together the communities of the Portland metropolitan region to plan the transportation system of the future by updating a shared the region's shared vision and investment strategy for the next 25 years.*

Our region's economic prosperity and quality of life depend on a transportation system that provides every person and business with access to safe, reliable and affordable ways to get around.

To get there, we need to work together to address these key questions:

1. What do we need most from our transportation system – now and in the future?
2. What can we afford and how do we pay for new projects while taking care of our existing roads, bridges, bikeways, sidewalks and transit services?
3. How should we measure progress toward our goals?

### **More people – and more changes – are coming**

A half-million new residents are expected to live in the Portland area by 2040. Our communities are becoming more culturally diverse, bringing rich cultural activity to neighborhoods. A new generation will grow to adulthood as others move toward retirement. To keep people connected and commerce moving, we need to work across interests and communities to bring innovative solutions to the challenges facing our changing region.



**“There's just so much you can't do in this part of the region without getting in your car or riding on the bus for hours. I have relatives in Portland, I have grandkids in Gresham, and it can take over an hour just to get out there.”**

*–Susan, Tigard resident for 23 years*



**“Every morning I commute from Forest Grove to Portland... If there is no traffic, 40 to 45 minutes I'll be downtown. But with traffic it takes at least an hour... If there will be anything faster, more reliable and affordable, I'll take it.”**

*–Edna, Portland area resident for 20 years*



“Transit is a big issue, especially for youth – and even for adults, too. Some places, on the weekends, they need to do things – it takes forever. It took me two hours almost just to get, by bus, from here to the Expo Center... I have to have a car to just do anything around there because it takes forever just to go anywhere, you know?”

– Jeremy, Clark County resident, works in Northeast Portland

Whether your roots in the region run generations deep or you moved to Oregon last week, you have your own reasons for loving this place – and Metro wants to keep it that way. Help shape the future of the greater Portland region and discover tools, services and places that make life better today.

**Metro Council President**

Tom Hughes

**Metro Council**

- Shirley Craddick, District 1
- Carlotta Collette, District 2
- Craig Dirksen, District 3
- Kathryn Harrington, District 4
- Sam Chase, District 5
- Bob Stacey, District 6

**Auditor**

Brian Evans

Metro Regional Center  
600 NE Grand Ave.  
Portland, OR 97232-2736

**New challenges need new solutions**

A history of leadership and collaboration has kept our system of roads, bridges, bikeways, sidewalks and transit ahead of the national curve. In general it serves us well, but there is more to be done. The system is aging and not keeping up with growth and changing travel needs. People and businesses are concerned about traffic congestion, safety, affordability, climate change and community health. Many residents – especially those of low income and communities of color – are underserved and have difficulty getting to jobs, training and other services.

Funding is tight, and we have multiple transportation priorities. But if not addressed, these challenges will compromise our region’s economic prosperity and quality of life.

“Prioritize investments that help the greatest number of people and reduce carbon emissions, while responding to income and racial equity.”

–2015 stakeholder interview



“Congestion is bad for everyone. People who commute far to work have less time with family. Cars idling on the roads produce pollution and greenhouse gases. And slow movement of goods is bad for the economy and affects all consumers.”

–2015 stakeholder interview

**Contact**

Contact Metro regional transportation planning to receive periodic email updates and notices of public comment opportunities:

503-797-1750  
trans@oregonmetro.gov  
oregonmetro.gov/rtp.

**Partnerships and leadership will create a great future**

The Regional Transportation Plan guides investments for all forms of travel – motor vehicle, transit, bicycle and walking – and the movement of goods and freight throughout the Portland metropolitan region. To stay ahead of future growth and take care of the transportation investments we have already made, our region’s elected, community and business leaders must work together to define what transportation investments are most needed, how much we can afford, and how we will pay for them over the next 25 years.

**Join in, be heard**

Choose how you stay informed and join the conversation now through 2018:

- speaker events and discussion groups
- online quick polls and surveys
- Metro Council and advisory committee meetings.

**Find out how to be involved – and more – at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp).**



Getting there with a connected region



# Exploring Big Ideas for Our Transportation Future

Regional Leadership Forum 1 | 8 to 11 a.m. Friday, April 22, 2016

Our region's economic prosperity and quality of life depend on a transportation system that provides every person and business with access to safe, reliable and affordable ways to get around.

## REGIONAL LEADERSHIP FORUMS 2016-18

- 1 Exploring Big Ideas for Our Transportation Future 4/22/16
- 2 Navigating Our Transportation Funding Landscape 9/23/16
- 3 Transforming Our Vision into Regional Priorities 12/2/16
- 4 Drafting Our Shared Plan for the Region Fall 2017
- 5 Finalizing Our Shared Plan for the Region Spring 2018

The Metro Council will convene MPAC, JPACT, state legislators, and community and business leaders in a series of discussions to foster leadership and collaboration to address our regional transportation challenges.

### Our shared challenges

Our region is facing the challenges and opportunities that come with growth. At the same time, several trends are shaping our transportation needs and the tools available to address them. How well we work together to respond to our shared challenges and trends will determine how sustainable, prosperous and livable our region will be in 2040.

### Today's desired outcome

To work across interests and communities to identify possible Big Solutions to consider through the 2018 RTP update.



# Voices from our region: Getting to a safe, reliable

“There’s places that trucks should not be in. There’s also places that bikes shouldn’t be in. There’s a place for everything. Not everywhere should be for both.”  
—*Lourdes Hitzfeld, Vancouver (driver of 35’ semi truck)*



“Improvements before potential disasters (earthquakes) are important, or all transportation (of food, ambulances, etc.) will stop.”  
—*Poll comment, Cedar Hills*

“I commute from Forest Grove to Portland... If there is no traffic, 40 or 45 minutes I’ll be downtown. But with traffic it takes at least an hour... If there will be anything faster, more reliable and affordable, I’ll take it.”  
—*Edna, Forest Grove*



“Walking to a bus stop is  $\frac{3}{4}$  mile, or the second option is  $1\frac{1}{2}$  miles away. I am 61 years old.”  
—*Poll comment, Aloha*

“I wish the government could do more to increase the number of buses, extending lines for the MAX, and putting in more bicycle lanes.”  
—*Martin Blasco, Hillsboro resident*



“The growing population and economy present an opportunity to develop suburb to suburb transit, in addition to traditional suburb or downtown routes.”  
—*Poll comment, Tigard*

“We keep putting money into roads. There will always be too much car traffic so quiet enabling this mode of transportation by building bigger roadway systems.”  
—*Poll comment, Southeast Portland*

“Having people who experience disabilities be involved in policymaking is great. I definitely want to improve public transportation because I don’t have any other options. I’m going to be using public transportation for the rest of my life.”  
—*Kiersi Coleman, Tualatin*



# People and affordable transportation future

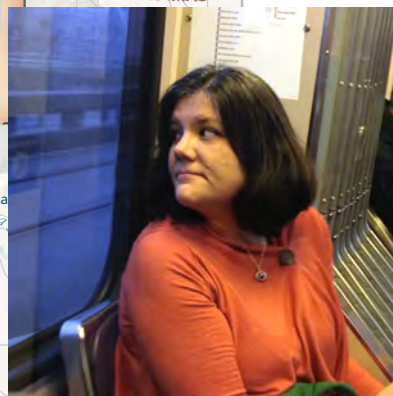
Housing patterns and displacement are requiring lower-income households to travel further to jobs, adding to an already high housing-transportation cost burden.”  
—Poll comment, Northeast Portland



“Banking is what brings me to Gresham. I love my neighborhood, but Sacramento Street is the only full through street in the area. So we got too busy of a street. It’s a not a matter of being quiet, it’s a matter of cars hit once a year.”  
—Dale, Portland (Parkrose)



“I came here because I had to get my computer fixed... I like how this is a small city, you do have that city feel but it takes 15 minutes to get across the city, not hours.”  
—Kelsey Franklin (visiting Bridgeport Village), Gresham



“The [MAX] ride from Milwaukie doesn’t vary much at all. That’s one of the best things about having the Orange Line. When I took the bus, the time to work was entirely dependent on the traffic.”  
—Adria Decker Dismute, Milwaukie

“I just want a city that has smooth transportation that works for commerce and individuals.”  
—Poll comment, Happy Valley



“We loved our old neighborhood so we started looking there. Then we realized we couldn’t afford anything we wanted... We got everything we wanted (in Tualatin). The only thing that would make it better is if the commute was any less. I’m looking at 45 minutes and my wife is about an hour.”  
—Brian McCauley, Tualatin

“Many road systems have not been upgraded to accommodate more traffic, or more modes of transportation. Expansion is difficult where roadways are already tight, and re-/alternating routing can create negative impacts on neighborhoods by increasing traffic.”  
—Poll comment, Clackamas



# What we've heard

More than 1,800 poll respondents in July and August 2015

## Big issues

*Thinking about how you, your family and friends in your community get around day-to-day, what transportation issues most impact your quality of life?*

Respondents were asked to pick three or add their own.

**23%** Traffic

**19%** Safety

**17%** Maintenance

Across Clackamas, Multnomah and Washington counties – the top three responses were traffic safety and maintenance. Respondents called for a range of strategies to address these issues:

- **More transit options and increased transit connectivity**, including light rail extensions, transit service expansion, and park and ride facilities.
- **Expand roadways in areas of consistent bottlenecks**, including a combination of freeway expansions and new roads to provide alternative routes.
- **More safe and convenient options for biking and walking** by completing gaps and building new connections

More than 5,000 poll respondents in January and February 2016

## Big trends

*What emerging trends do you think will most affect the future of travel?*

Respondents were asked to pick three or add their own.

**70%** **Aging infrastructure** Our freeways, roads and bridges are aging and not as prepared for natural disasters (flooding, earthquakes).

**56%** **Growth** More people and goods are using the transportation system as our population and economy grow.

**48%** **Changing demographics** Our population is aging and becoming more ethnically diverse.

**44%** **More travel options** Our transportation system has more options for getting around (car, transit, biking and walking options)

**35%** **Technology** Advances in technology (GPS, mobile devices, driverless and electric vehicles, online shopping, automation) will change travel.

**16%** **Shared mobility services** People are using Uber, Zip Car, bike-share and other ride services more.

### Metro

Whether your roots in the region run generations deep or you moved to Oregon last week, you have your own reasons for loving this place – and Metro wants to keep it that way. Help shape the future of the greater Portland region and discover tools, services and places that make life better today.

### Metro Council President

Tom Hughes

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Kathryn Harrington, District 4  
Sam Chase, District 5  
Bob Stacey, District 6

### Auditor

Brian Evans

Metro Regional Center  
600 NE Grand Ave.  
Portland, OR 97232-2736



4/20/16

Getting there with a connected region



2018 REGIONAL TRANSPORTATION PLAN UPDATE  
REGIONAL LEADERSHIP FORUM

### Exploring Big Ideas for our transportation future


Metro | Making a great place

### Share the conversation

#RTP2018  
@oregonmetro  
@R\_T\_Rybak

Metro | Making a great place

### Getting to a safe, reliable and affordable transportation future




Metro | Making a great place

### R.T. Rybak

#### More than just Point A to Point B

Building great communities, boosting economic prosperity and ensuring quality of life through transportation investments



Metro | Making a great place


### Three term mayor of Minneapolis

- Economic development
- Affordable housing
- Transportation
- Youth violence prevention

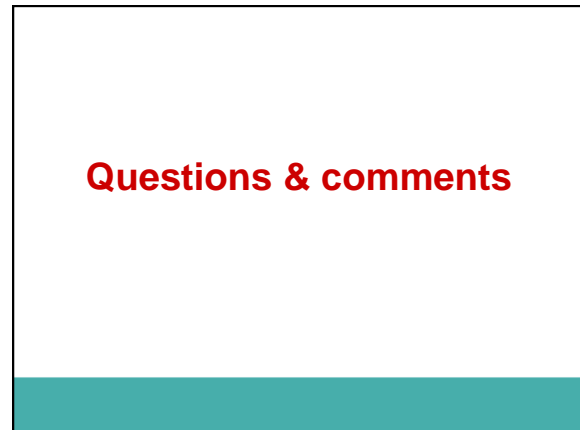
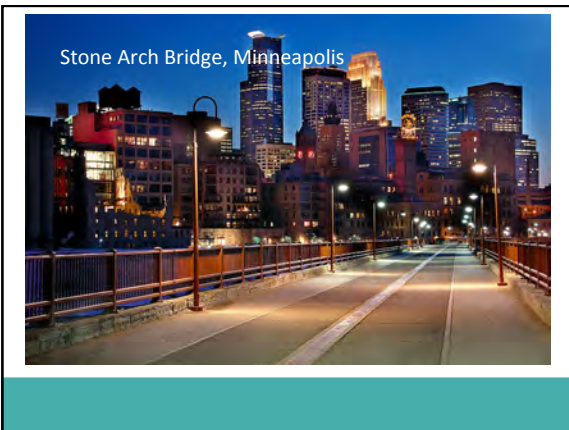
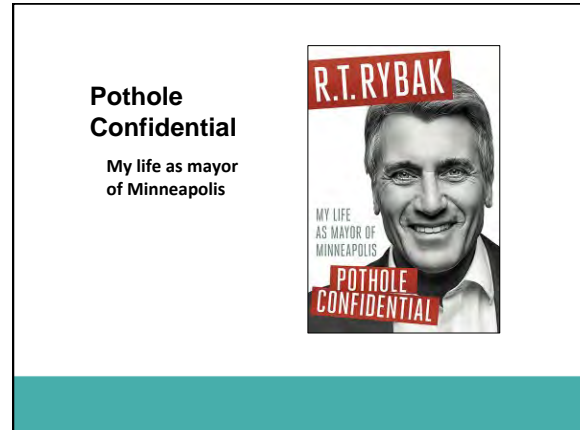
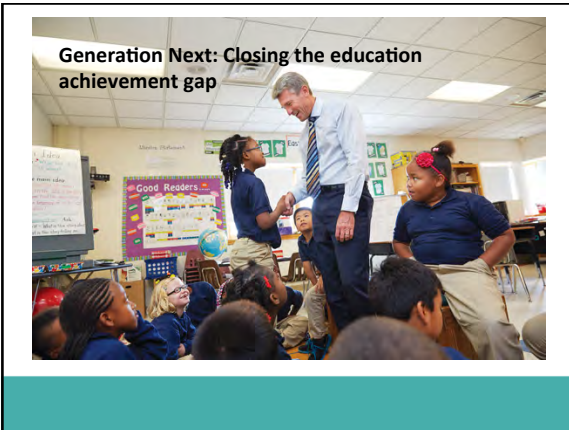


Metro | Making a great place

### I-35 W Mississippi Bridge collapse, Aug. 1, 2007



Metro | Making a great place





## Big Solutions

Viewing the RTP as a tool for change, what Big Solutions should be considered in the 2018 RTP update?

## Next steps

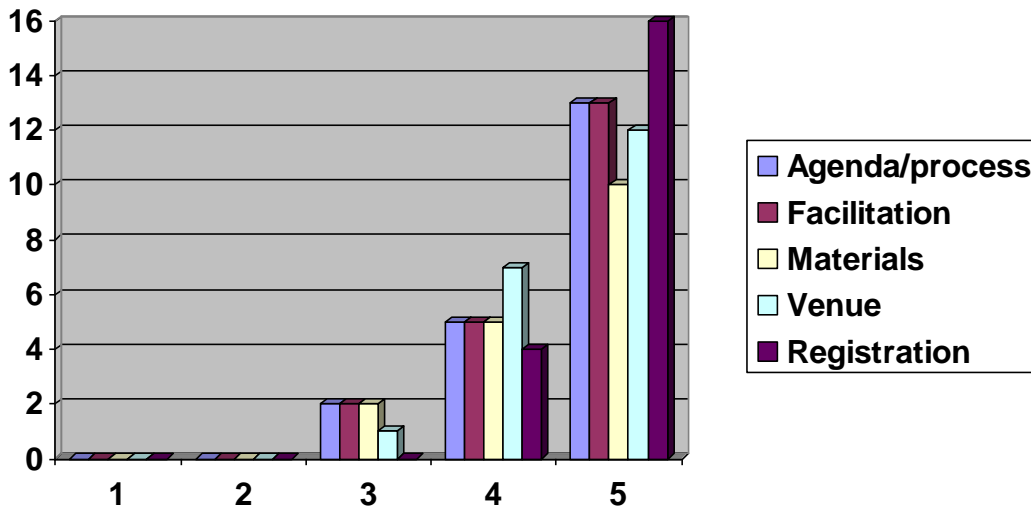
- Watch for summary report
- Continue discussion at regional advisory committees
- Sept. 23, 2016, forum on transportation funding

**Regional Leadership Forum 1**  
**Exploring Big Ideas for our transportation future**  
**FORUM EVALUATION RESULTS**

Sample size = 20

*Event evaluation*

On a scale of 1 (poor) to 5 (excellent)



**Based on your experience of today's forum:**

**What was the best part of the morning?**

- RT Rybak
- Table discussion
- Action items
- Cross pollination of electeds, business and advocates
- Strong agenda
- Keynote w/Q&A
- Good people

**What could have been better?**

- More millennials in the room
- More community members and businesses
- Parking validation for community and business members
- Unlocking the door next to the MAX stop
- Topics too broad; discussion abstract
- Encourage SW Washington legislators be invited
- All good

**Better?**

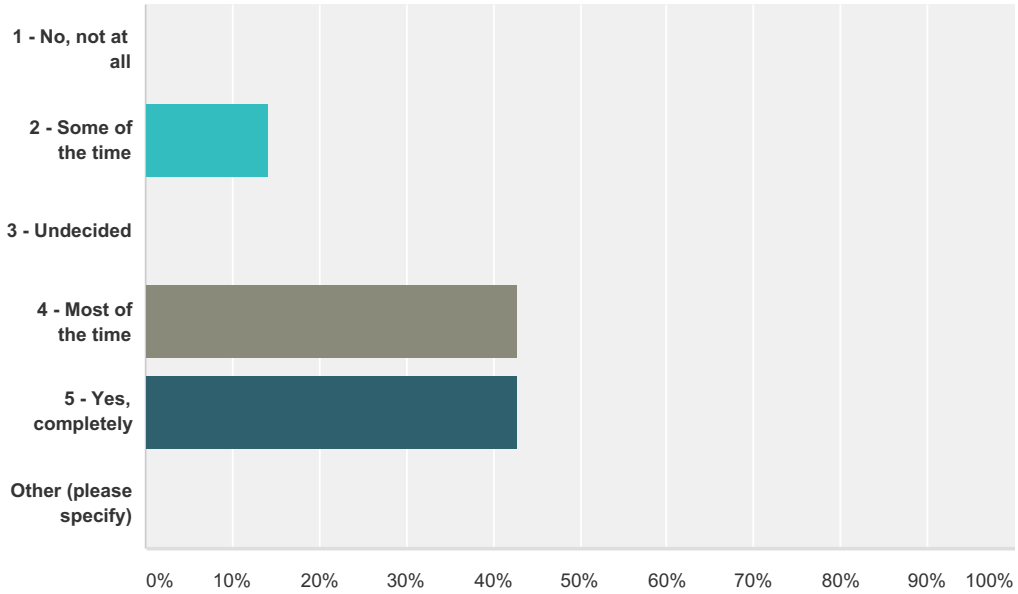
- More diversity needed
- Need more seed ideas
- Fairly new to process; would help to know current status of RTP
- Well done
- Allowing people to attend virtually
- Bigger thinking – out of the box new ideas; really thinking about the future
- Not dividing the room and time for tables
- Longer group discussion
- What is most important: Moving people? Moving freight?
- Stronger focus on building solutions/priority list; table was diffuse because ran out of time; shape of desired outcome not fully clear

**Do you feel the 2018 Regional Transportation Plan update is on track? If yes, why? If no, briefly state concerns.**

- Yes. Destruction of silo mentality
- Yes. Focusing on the important parts
- Yes. Looking forward to participating as process moves forward
- Yes. Community involvement is key
- Yes. Good variety of stakeholders
- Yes, but first time I've been a part of the process
- In general, yes; thanks for including business voices
- So far, fine; it's early
- Good start. Need to promote and do regional projects of all sizes
- Let's talk ☺
- No clue
- We will see – draft what we're saying
- Barely
- Can't solve future issues with current solutions
- Not sure.
- No. We need funding

### Q1 Based on your experience at the discussion tables, do you feel your perspective was heard?

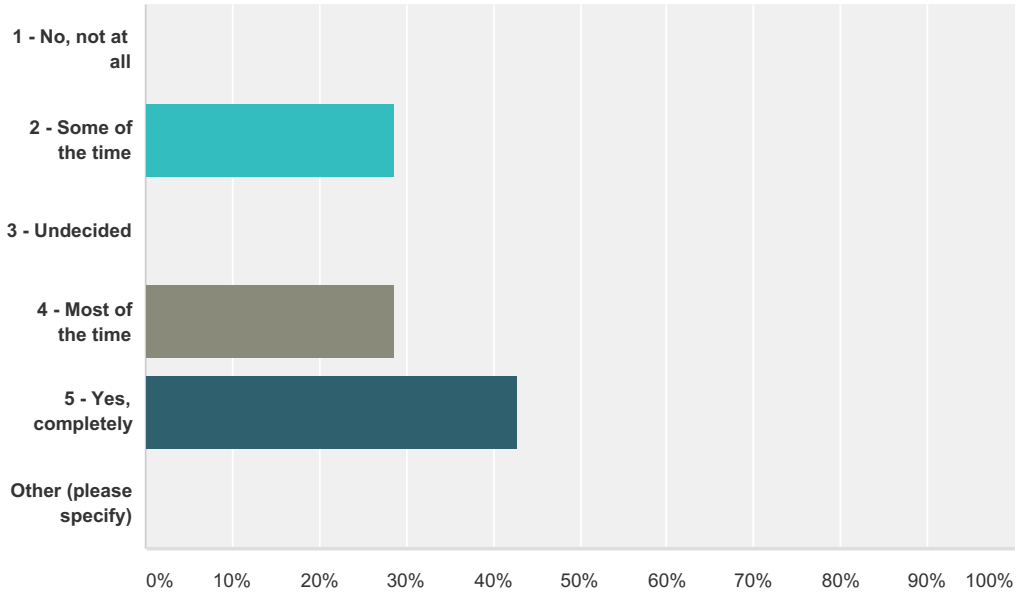
Answered: 7 Skipped: 0



Answer Choices	Responses
1 - No, not at all	0.00% 0
2 - Some of the time	14.29% 1
3 - Undecided	0.00% 0
4 - Most of the time	42.86% 3
5 - Yes, completely	42.86% 3
Other (please specify)	0.00% 0
<b>Total</b>	<b>7</b>

## Q2 Based on your experience, do you feel your expertise was recognized and respected?

Answered: 7 Skipped: 0



Answer Choices	Responses
1 - No, not at all	0.00% 0
2 - Some of the time	28.57% 2
3 - Undecided	0.00% 0
4 - Most of the time	28.57% 2
5 - Yes, completely	42.86% 3
Other (please specify)	0.00% 0
<b>Total</b>	<b>7</b>

## Q3

**What would you recommend be changed, added or discontinued in the discussion format to improve your experience at the next forum?**

- Answered: 6
- Skipped: 1

It's challenging to be the sole 'community' voice at a table dominated by decision-makers who are familiar with one another and with decision-making processes; often the conversation around big ideas kept being neutered by a conversation around the political feasibility - sort of defeats the purpose of generating discussion around big ideas, no?

4/27/2016 7:49 PM

It would be great to have two, differing "community" perspectives at each table, e.g. housing & bikes, or transit & schools. It's important that our elected officials hear that there are multiple community issues (just as there are multiple issues for elected officials, too), and that burden to be the expert/representative shouldn't be carried by just one person.

4/25/2016 4:33 PM

I wonder if you all could just do seating assignments without overtly labeling people. But given what I saw you probably do need to make sure you have specific representation. I saw one elected official place his name placard on top of a community rep placard at the table I was seated at...it was indicative of the kind of dynamics you all are working to overcome. At the same time I feel like overt labeling can reinforce old silo's in ways that aren't helpful! Thanks for much for your work on this-

4/25/2016 12:13 PM

The differences in views on the realities of our transportation system are far enough apart, that it would take a lot more time to build greater understanding at the points of disagreement: induced demand; biking, walking and transit as modes that are just as real for those using them as cars are for drivers; the injustice of the external costs of parking. This is especially true with the power differential at tables - decision-makers have more influence and community members have to pick and choose which issues they can even begin to push on.

4/25/2016 7:39 AM

Nothing comes to mind.

4/22/2016 7:21 PM

No, nothing.

4/22/2016 7:16 PM

### **Metro respects civil rights**

Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights) or call 503-797-1536.

Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1700 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. For up-to-date public transportation information, visit TriMet's website at [www.trimet.org](http://www.trimet.org).

**Metro is the federally mandated metropolitan planning organization** designated by the governor to develop an overall transportation plan and to allocate federal funds for the region.

The Joint Policy Advisory Committee on Transportation (JPACT) is a 17-member committee that provides a forum for elected officials and representatives of agencies involved in transportation to evaluate transportation needs in the region and to make recommendations to the Metro Council.

The established decision-making process assures a well-balanced regional transportation system and involves local elected officials directly in decisions that help the Metro Council develop regional transportation policies, including allocating transportation funds.

**Project website:** [www.oregonmetro.gov/rtp](http://www.oregonmetro.gov/rtp)

*The preparation of this report was financed in part by the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration. The opinions, findings and conclusions expressed in this report are not necessarily those of the U.S. Department of Transportation, Federal Highway Administration and Federal Transit Administration.*

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

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

**Metro Council President**

Tom Hughes

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

May 25, 2016





DATE: May 25, 2016  
TO: TPAC, MTAC and Interested Parties  
FROM: Kim Ellis, RTP Project Manager  
SUBJECT: 2018 Regional Transportation Plan Update – Technical Work Group Meetings

\*\*\*\*\*

**PURPOSE**

Provide electronic copies of meeting notes from technical work group meetings. No action requested.

**BACKGROUND**

At the January meeting, members of the Transportation Policy Alternatives Committee (TPAC) requested meeting notes from work group meetings be provided to TPAC and the Metro Technical Advisory Committee (MTAC) to help TPAC and MTAC members stay informed of the work group discussions and progress.

The current schedule of work group meetings and copies of meeting notes completed since February 24 are attached.

**FOR MORE INFORMATION**

All work group meeting materials and other project related information are posted online at: [www.oregonmetro.gov/rtp](http://www.oregonmetro.gov/rtp).

Attachments

- Schedule of technical work group meetings (*May 5, 2016*)
- Regional Transit Technical Work Group Meeting #2 (*February 24, 2016*)
- Finance Work Group Meeting #1 (*February 29, 2016*)
- Transportation Equity Technical Work Group Meeting #3 (*May 12, 2016*)
- Performance Technical Work Group Meeting #2 (*April 25, 2016*)
- Safety Work Group Meeting #1 (*May 20, 2016*)

## 2018 RTP UPDATE | Technical Work Group Meetings

2016	Equity	Finance	Transit	Freight	Performance	Safety	Design
January	<b>Jan. 8</b> 9-11 a.m. Room 401, MRC		<b>Jan. 7</b> 10 a.m.-noon Room 401, MRC	<b>Jan. 20</b> 8-9:30 a.m. Room 370, MRC			
February	<b>Feb. 18</b> 1-3 p.m. Room 401, MRC	<b>Feb. 29</b> 2:30-4:30 p.m., Room 501, MRC	<b>Feb. 24</b> 1 - 3 p.m., Room 401, MRC		<b>Feb. 22</b> 2-4 p.m. Room 501, MRC		
March							
April					<b>April 25</b> 2-4 p.m. Room 501, MRC		
May	<b>May 12</b> 1-3 p.m. Room 401, MRC	<b>May 12</b> 9-11 a.m., Council Chamber, MRC		<b>May 23</b> 10 a.m.-noon, Council chamber MRC		<b>May 20</b> 9 a.m.-noon Room 270, MRC	
June	<b>June 30</b> 1-3 p.m. Room 401, MRC	<b>June 14</b> 9-11 a.m., Room 401, MRC	<b>June 9</b> 1-3 p.m., Room 370A/B, MRC		<b>June 27</b> 2-4 p.m. Room 501, MRC		
July			<b>July 19</b> 9-11 a.m., Room 370A/B, MRC			<b>July 26</b> 8:30-10:30 a.m., Room 370A, MRC	
August		<i>TBD thru work group doodle poll</i>					
September	<b>Sept. 15</b> 1-3 p.m. Room 401, MRC		<i>TBD thru work group doodle poll</i>	<i>TBD thru work group doodle poll</i>	<b>Sept. 12</b> 2:30-4:30 p.m. Room 501, MRC		
October			<i>TBD thru work group doodle poll</i>			<b>Oct. 25</b> 9-11 a.m. Room 370B, MRC	
November	<b>Nov. 17</b> 1-3 p.m. <i>(if needed)</i>						<b>Nov. 15</b> 9 a.m.-noon Room 370A, MRC
December							

Meetings of the Policy Actions Work Group begin in 2017. Meeting materials will be posted at [oregonmetro.gov/rtp](http://oregonmetro.gov/rtp) and [oregonmetro.gov/calendar](http://oregonmetro.gov/calendar)

Updated 5/5/16



Regional Transit Work Group Meeting #2  
Wednesday, February 24, 2016  
1:00 to 3:00 p.m.  
Metro Regional Center, Room 401

**Committee Members Present**

Dan Bower	Portland Streetcar Inc
April Bertelsen	City of Portland
Mike Coleman	Port of Portland
Brad Choi	City of Hillsboro
Karyn Criswell	Oregon Department of Transportation
Radcliffe Dacanay	City of Portland
Andrea Hamberg	Multnomah County/Environmental Health Dept
Roger Hanson	C-TRAN
Eric Hesse	TriMet
Jon Holan	City of Forest Grove
Katherine Kelly	City of Gresham
Mauricio LeClerc	City of Portland
Stephan Lashbrook	City of Wilsonville/SMART
Lori Mastrantonio	Clackamas County
Kate McQuillan	Multnomah County
Luke Norman	Clackamas County Community College
Alex Page	Ride Connection
Dyami Valentine	Washington County
Dayna Webb	City of Oregon City
Steve White	Oregon Public Health Institute

**Metro Staff Present**

Jamie Snook  
Grace Cho

## **I. INTRODUCTIONS**

Members of the work group introduced themselves and answered the ice breaker question.

## **II. PURPOSE STATEMENT**

It was proposed to build off of the Climate Smart Strategy transit outcome: “To make transit more convenient, frequent, accessible and affordable” was proposed as a purpose statement for the Regional Transit Strategy. This was proposed as the purpose statement for the Regional Transit Strategy and would be discussed in more detail at our next meeting. Members discussed ideas about including the region’s growth, safety, equity and connectivity.

## **III. EXISTING CONDITIONS**

An overview of the existing conditions was presented. This was not comprehensive and was presented to solicit input on what or how the existing conditions should be presented. Some themes that were discussed are:

- The Metropolitan Planning Area makes sense as the boundaries for the existing conditions, but it should be clearer about the boundary delineation
- Include transit service that is in/out of the region
- Should include about first/last mile services, including how people access transit, but also to know who needs other services aside from walking to access transit
- Include data from other transit service providers in addition to TriMet
- It would help to see a map of where communities of color reside and where they work
- Is it possible to look at trends over time where possible
- Provide existing conditions for transit service specific for elderly and disabled
- Add legends and thresholds to maps
- Include safety
- Include reliability and time spent in traffic as a measure
- Some of the data presented needs narrative help provide context
- For the sidewalk maps, focusing on the gaps might be the right approach
- Consider is the ODOT Region 1 Active Transportation Needs Assessment

## **IV. WHY SHOULD WE CARE? AND OPPORTUNITIES**

There was a discussion about why should we care about transit. It was discussed that land use is an important part of the story. We should also include how transit supports future growth and the 2040 Growth Concept for the region.

There was a brief discussion about the disruptive world of Transportation Network Companies and the impact on the system. The group agreed that there should be a policy discussion around this technology. Some comments similarly were made around connected vehicles and some exciting developments around crash prevention.

## **V. TOPICS MISSING**

There was a discussion about what information is missing. Ideas discussed include:

- The Oregon Public Transportation Plan (OPTP) and passenger rail
- Include the bike network in access to transit
- How transit supports regional growth
- Travel shed and accessibility should be further explored
- Map ridership and show demand locations/routes
- Showing the shuttle system network and making the connection to higher education and employment
- Park and rider performance
- There are a lot of different agencies which run service into the metro area, but are located outside the Metro region. They serve different clients and have different stories. These stories should be featured.

## **VI. ADJOURN**

The meeting at was adjourned at 3:05 p.m.

Attachments to the Record:

Item	Topic	Document Date	Description
1	Agenda	2/24/16	February 24, 2016 Meeting Agenda
2	Web link	9/15/09	Metro Regional High Capacity Transit (HCT) System Plan
3	Web link	July 2011	Metro Regional High Capacity Transit System Plan System Expansion Policy
4	PDF	2/24/16	February 24, 2016 Meeting Presentation





**2018 RTP Finance Work Group - Meeting #1  
February 29, 2016  
2:30 - 4:30pm  
Metro Regional Center, Room 501**

**Committee Members Present**

<b>Name</b>	<b>Affiliation</b>
Karen Buehrig	Clackamas County
Kelly Brooks	ODOT
Richard Blackmun	Forest Grove
Talena Adams	ODOT
Tina Bailey	Hillsboro
Don Odermott	Hillsboro
John Lewis	Oregon City
Mark Lear	Portland
Ken Lee	Portland
Chris Deffebach	Washington County
Katherine Kelly	Gresham
Jaimie Lorenzini	Happy Valley
Nancy Kraushaar	Wilsonville
Joanna Valencia	Multnomah County
Eric Hesse	TriMet

**Metro Staff Present**

Ted Leybold  
Ken Lobeck  
Kim Ellis  
Jamie Snook

**I. WELCOME AND INTRODUCTIONS**

Ted Leybold welcomed members to the kick-off meeting for the finance work group. Work group members introduced themselves.

**II. 2018 REGIONAL TRANSPORTATION PLAN UPDATE**

Kim Ellis, Metro staff provided an overview of the timeline for updating the regional transportation plan (to be adopted in the 2018), why the RTP is important, describing that it guides how investments are made in the region and will shape what communities will look like

in the future, how people will be able to get around and it establishes eligibility for federal and state transportation funding.

### **III. FINANCE WORK GROUP PURPOSE, CHARGE AND SCHEDULE**

Metro staff provided a brief overview of the schedule, role and the expectations of work group.

#### **Discussion on state and federal forecast development:**

Ken Lobeck, discussed development of the federal and state funding assumptions being developed by ODOT's Long Range Funding Assumptions (LFRA) work group. The LFRA work group is comprised of various staff from the State Economic Analysis Unit, ODOT economic forecasting section, ODOT regions, MPOs, and transit agencies. The purpose of the work group is to develop consistent and approved funding methodologies for inclusion into the MPOs RTPs. Key discussion areas included:

- Timing of the release of ODOT LFRA forecast work – originally May but now anticipated to release the 2015-2040 revenue forecast in July to factor into FAST Act provisions.
- Some preliminary forecasting assumptions are leaning to a positive revenue forecast for future years. However, due to the FAST passage, the LFRA needs to re-evaluate their core assumptions to ensure they are consistent with FAST.
- The state work will inform ODOT of discussions on near-term STIP and Fix-it/Enhance programs as well as long-range plan for how much will be available for OMP and Capital.
- Questions were raised about how to engage with State work to ensure we are supportive of their revenue assumptions as well as the cost assumptions for “adequately” maintaining the transportation system.

#### **Discussion on local forecast development:**

Ken Lobeck explained how the revenue forecast will be developed and included into the RTP Finance Plan. He explained the proposed composition of the Finance Plan that will include an overview, economic conditions section, revenue assumptions and methodology section, revenue definitions and use parameters section, and a planned MTIP funding summary section.

The revenue forecast will contain all reasonably available federal, state, and local funds projected to be available over the RTP horizon period (2018-2040). While the LFRA is working to develop the federal and state funds revenue forecast, Metro needs the local agencies to identify all local revenue sources that are committed to transportation system improvements.

The discussion around the identification of local revenue sources included the following:

- Identifying local sources – capital and OMP:
  - Tell Metro staff everything that is being funded locally, (but also let Metro staff know if some of the projects being funded will not be in the RTP).
  - Include historical development sources (non-creditable developer exaction which doesn't always have same historically documentation and may be addressed differently by each jurisdiction).
  - Important to include any revenue source that is spent on transportation improvements.
  - The revenue forecast range (applicable more to federal funds) will be narrowed down to one final forecast for all revenue sources for the constrained RTP.



- Historical data may not show current trend – growth is occurring faster now because of reserves (last 10 years)
- Recent adopted changes in calculations /assessments should be identified
- Give time bands and projections if they have them and identify projects that are linked to specific sources if that is available
- Methodology by which the local revenue forecast was developed
- National Association of Counties and League of Oregon Cities reports on maintenance costs (pavement and bridges for all streets):
  - Need to work out how to break out urban vs. rural if possible.
  - More discussion on O&M investments in relation to eventual projects entries into the RTP.
  - Questions and discussion about options for documenting maintenance costs across the region.
- Methodology for state gas tax increases should be applied to the city and county gas tax collection:
  - County gas tax
  - City gas taxes
  - State gas tax and how that is passed through
- Clarifying the difference between Constrained RTP and more aspiration Strategic RTP:
  - How the Constrained RTP meets federal requirements for fiscal constraint and the Strategic RTP.
  - How the strategic funding level and funding sources will be set by JPACT and the Metro Council.
- Policy suggestions related to assumptions and to what degree should be discussed by work group:
  - Strategic revenues definition – political appetite of the region – scale of additional revenues needed and what that would be the equivalent in the future.
  - HCT and CRC financial capacity example.
    - More discussion on what to assume for RTP Constrained and RTP Strategic funding sources.
    - What final methodologies will be used to determine what meets the Constrained versus Strategic funding requirements.
- How RTP funding allocated given that some jurisdictions are raising more money locally – locally raised revenues are your source capacity for projects:
  - Tracking funding to projects in the area that generated the funding will be important.
  - County-coordinating committees can be the tool where this gets sorted out,
- Additional discussions about maintenance at local and state levels and its relationship to the RTP, investment strategies, and eventual project submissions into the RTP:
  - May need to be discussed tailored approach around maintenance
- More discussion needed on how debt service fits into the forecast
- More discussion needed on approach for addressing operations and maintenance costs

#### Summary of the discussion areas:

- The local revenue contributions and investments represent a significant portion of the local agency revenues to transportation, but most are probably not being committed on the regional transportation system network.
- There is strong interest to see the local O&M “big-picture” among the jurisdictions.
- There is great interest to analyze the local investment from different perspectives to help shape the later regional investment strategies for the RTP.

#### **IV. NEXT STEPS AND ADJOURN**

The previous discussion areas reflect a need among all to obtain a clearer picture of the transportation investments across the region. Ken Lobeck summarized that first key step is identify all local transportation sources so follow-on analysis and reviews can then occur. Work Group members stated that agency public works directors and those working on transportation project delivery may not understand the full intent of why Metro is requesting the local revenue sources for the RTP.

As a result of this discussion, RTP Finance Work Group requested Metro follow-up with a formal revenue request letter. Metro will send the request letter to Finance Work Group members who will assist in distributing it to the appropriate agency public works directors or appropriate transportation staff. The follow-up actions include:

- Send the Metro revenue request letter to the Finance Work Group Members with the specific funding data needed and due back to Metro by April 6, 2016 if possible.
- Metro has offered to meet with jurisdictions individually to walk through the revenue data request to help identify the local revenues if needed.
- County-coordinating committee staff leads will convene county-level work groups if needed to share and coordinate data. These groups could include staff representing finance, asset management, maintenance and operations and planners. They also will help pass on the revenue request and explain the reasons for the request to local agency staff.
- Portland staff may convene a meeting of appropriate staff to discuss how to complete the revenue identification task and will coordinate with Metro if one-on one meeting or group meetings are the best option.
- Metro staff indicated they are flexible and can tailor revenue meetings to fit the needs of the local agencies.
- Finally, to help understand the request, Finance Work Group members asked Metro to develop an example agency revenue summary sheet and pass it on to them so local agencies can see how the revenues will be displayed in the Finance Plan.

With no further business to discuss, the meeting was adjourned at approximately 4:15 pm. The next meeting of the RTP Finance Work Group is scheduled for Tuesday, April 26, 2016, 9:00-11:00 am, Metro, Room 401.

Approved as written,  
Kenneth F. Lobeck, RTP Finance Work Group Leader  
March 4, 2016



**2018 RTP Transportation Equity Work Group – Meeting #3**  
**Thursday, May 12, 2016**  
**1:00 – 3:00 p.m.**  
**Metro Regional Center, Room 401**

<b>Committee Members</b>	<b>Affiliation</b>	<b>Attendance</b>
Duncan Hwang	APANO	Present
Jessica Berry	Multnomah County	Present
Stephanie Caldera	Oregon Department of Environmental Quality	Present
Brad Choi	City of Hillsboro	Present
Brendon Haggerty	Multnomah County Health Department	Present
Zan Gibbs	City of Portland – Transportation	Present
Jared Franz	Amalgamated Transit Union	Present
Aaron Golub	Portland State University	Present
Heidi Guenin	Transportation Council	Present
Scotty Ellis	Metro	Present
April Bertelsen	City of Portland – Transportation	Present
Jake Warr	TriMet	Present
Cora Potter	Ride Connection	Present
Steve Williams	Clackamas County	Present
Kari Schlosshauer	National Safe Routes to School Partnership	Present
Karen Savage	Washington County	Present
Kay Durtschi	Citizen Member of MTAC	Present
Terra Lingley	ODOT	Present
<b>Interested Parties</b>		
Katie Selin	Portland State University	Present
Eliot Rose	ICF	Present
Radcliffe Dacanay	City of Portland – Planning and Sustainability	Present
<b>Metro Staff</b>		
Grace Cho	Metro	Present
Lake McTighe	Metro	Present
Cliff Higgins	Metro	Present
Ted Leybold	Metro	Present
Jamie Snook	Metro	Present
Dan Kaempff	Metro	Present
John Mermin	Metro	Present
Peggy Morell	Metro	Present

## **I. WELCOME**

Cliff Higgins welcomed meeting attendees and walked through the agenda for the work group meeting.

## **II. WORK GROUP MEMBERS INTRODUCTIONS AND PARTNER UPDATES**

All those present introduced themselves and provided a brief update on who they've discussed the transportation equity work with since the last meeting and what they heard in response.

## **III. SPRING ENGAGEMENT UPDATE**

Mr. Higgins and Peggy Morell provided an overview of the upcoming spring engagement strategy to help support the efforts for the transportation equity analysis for the Regional Transportation Plan (RTP). Mr. Higgins explained the change in approach Metro has taken in engaging the broader public. He explained in previous practice, a public comment period may have asked for comments on the material in a planning document, which had proved to be a barrier to participation, especially for historically underrepresented communities. He followed up by explaining the new approach is to ask the public more value and opinion-oriented questions which would be less barrier of entry for participation.

Following Mr. Higgins comments about Metro's change in engagement approach, Mrs. Morell provided an update on planned spring engagement activities. Mrs. Morell told the work group Metro plans to build off of the community summit model conducted in spring 2015. The engagement would entail partnering with community organizations that serve historically underrepresented communities to hold 3-5 discussion groups. The questions for the discussion groups would follow up on questions asked at the community summit in 2015 as well as reaffirm the findings of community priorities identified for the transportation equity work. Mrs. Morell emphasized Metro staff has been applying the different recommendations and strategies heard from community organizations in designing the spring engagement approach. She also mentioned there will be an online engagement opportunity which will look to focus on gathering further input from historically underrepresented communities.

At the end of the presentation, Mr. Higgins and Ms. Morell paused to take any questions.

A work group member asked if Metro is employing a best practice of compensating community organizations which facilitate or host discussion groups and whether participants are compensated.

Mr. Higgins and Mrs. Morell responded Metro has been moving in that direction and the spring engagement plan will be compensating facilitators and participants.

A work group member made a comment regarding the necessity for public agencies to be better coordinated when it comes to engagement efforts. While he applauded that public agencies are

engaging historically underrepresented communities, he also stressed the lack of coordination between internal departments or even between external agencies are over taxing the ability of community organizations and community members. He also mentioned the numerous engagement touch points are frustrating communities because of the lack of immediate results.

Another work group member noted the necessity for having a strong communication strategy with members of the public and with decision-makers. The work group member stressed that much of the work done in planning is on a long-range time scale which can frustrate community members who are experiencing challenges in need of more immediate attention. The work group member also stressed recognizing the shorter timeframe community members are on and the work being conducted in the 2018 RTP should also balance and strategize the short-term actions with long-term actions.

#### **IV. BREAK**

Mr. Higgins excused everyone for a short stretch break.

#### **V. SYNTHESIS OF FEEDBACK AND FINDINGS OF COMMUNITY PRIORITIES**

For the second item of business, Ms. Cho presented the process Metro staff used to determine the findings of community priorities. She walked through how three main public comment approaches, which included the public comment retrospective, an online questionnaire which focused on transportation and equity, and the work group exercise from February, was qualitatively assessed to determine major reoccurring themes. She gave a brief recap of each public comment approach and then explained which reoccurring themes resulted from looking at all three approaches. Ms. Cho then explained the major reoccurring themes and key sub-themes became the findings of community priorities.

#### **VI. 2018 RTP DRAFT TRANSPORTATION EQUITY EVALUATION MEASURES FOR FURTHER EXPLORATION**

After the discussion of the community priorities findings, Ms. Cho then launched into a presentation of how the findings of community priorities informed the development of 2018 RTP draft transportation equity evaluation measures. She started off by reminding the work group that its charge is to recommend to Metro staff how to consider and assess equity in the 2018 RTP investment package. She also mentioned it was the work group charge which defined how the draft transportation equity measures were selected to present before the work group.

Once Ms. Cho reminded the work group of its charge, she explained the simplified screening and categorization process employed narrow down the list of findings to a set of draft recommended measures. She briefly discussed the two main questions which were used. These questions were:

- Would this community priority be further informed through a transportation system evaluation?
- Can this priority be measured across the transportation system of investments?

Ms. Cho also explained the findings of community priorities addressed a variety of transportation and equity concerns in which the evaluation of the 2018 RTP investment package may not be the best arena for addressing the concern.

Ms. Cho presented a set of discussion questions to kick off the conversation with the work group. She also asked that at the end of the discussion, she is seeking an informal action to move forward into a research and exploration phase with the 2018 RTP draft transportation equity measures.

A work group member asked for clarification if the draft measures are intended to reflect outcomes. Metro staff clarified the draft measures are intended to measure outcomes.

A work group member made a comment that while she thought the draft measures for exploration were positive, she wanted to recognize the level of effort potentially needed for several of them and the lack of ability to measure others. She suggested for Metro staff not to overpromise on the measures.

Another work group member asked how would the allocation of resources be connected to the measures and the analysis? Metro staff did not answer this question at the meeting, but since meeting, staff has come to identify that since the draft transportation equity measures will be evaluating the system of investments identified in the 2018 RTP, there will be an inherent consideration of resource allocation. Some of the discussion may come to considering and prioritizing transportation projects which will serve historically underrepresented communities in the near-term.

Another work group member made a comment saying the Metro staff decision to call out transit as an individual measure may not make sense as it is a means to an end and not an outcome. Metro staff is willing to weave transit into the broader measures, but asked permission for the research and exploration phase to take a strong look at transit.

A work group member commented that the presentation of the draft transportation equity measures are too general and therefore it is hard to provide comments which may help “move the dial” or direct the region towards equitable outcomes. Metro staff clarified the draft measures being presented at the May meeting are in need of further exploration to define the methods and details. However, in presenting the measures at this stage, Metro staff looked to get a gauge of whether the measures are moving in the right direction.

A comment made by a work group member noted the draft transportation equity measures did not address any policies, particularly the policy pieces to address affordability. Added to the same comment by another group member was that the measures did not address intersecting issues. Metro staff responded in saying the next item on the agenda, which outlines the potential products from the TEA work, will outline an approach for the policy considerations and recommendations for the 2018 RTP.

Another comment asked about data, particularly around safety and the risk factors. The work group member suggested these pieces should be addressed in the exploration.

The comments on how to communicate the transportation equity work was brought up again for the work group to think about. The transportation equity measures should be consumable for all audiences and be responsive.

Another work group member agreed with the public health measure that avoids further burdening historically underrepresented communities, but also expressed the measure should look to remedy past disparities. A follow on to this comment suggested being specific and define the term disproportionate.

Several work group members noted there was a lack of a call out of active transportation in the draft transportation equity measures. Work group members noted that active transportation modes are critical for underrepresented communities and that it might be worth reframing some of the measures. Metro staff responded in saying inherently the measures include active transportation modes and infrastructure.

Another work group member suggested reframing the public health measure as a lens. To the same point, another work group member asked that public health not be limited to the consideration of air quality, but also include land consumption and water quality.

There were some questions from work group members of whether the measures will be focused on the system level or focused geographically. Work group members supported the notion of measuring transportation investments in the places where specific needs exist. Metro staff responded saying the work will likely need to address both the system and geographic areas in order to understand the how future transportation investments support the desired outcomes of historically underrepresented communities.

Another work group noted there will be some interesting challenges with the exploration of the draft transportation equity measures as certain topics, such as transportation safety, can be approached from a less tangible means like behavior whereas others are more easily measured like infrastructure.

A comment was made to prioritize an accessibility measure which addresses access to good jobs.

Following on to the access to good jobs comment, another work group member expressed disappointment in the lack of discussion about workforce development in the draft transportation equity measures. The work group member continued with different workforce development examples which are connected to transportation, particularly around procurement. The work group member expressed good jobs as a topic which resonates with community as it improves overall household income and alleviates poverty conditions.

Another work group member noted that another intersecting issue of education is not being addressed as part of the transportation equity work.

A work group member asked to have involuntary displacement measure put into consideration for further exploration. Another work group member seconded the request with interest in knowing the tipping point with transportation investments and correlating displacement. Metro staff responded by asking that the work group take an action at the end of the discussion, in the form of a thumbs up/thumbs down, on whether to include involuntary displacement.

A work group member asked that if involuntary displacement measure is selected by the work group for further exploration and consideration, that it be rethought as community stabilization. The rationale for the comment was to suggest that a major transportation investment should not be discounted in an area with high need because of its potential for displacement.

Mr. Higgins asked the work group to vote on whether to include displacement/community stabilization on the list of measures for further exploration. The work group members voted and community stabilization was passed by work group members for further exploration. A small number of work group members expressed strong concern about the ability to measure displacement, the political palatability of the topic, and the resource allocation needs which would draw away from attending to developing the other measures.

Another work group member commented that other public agencies are researching the topic of displacement and not to lose faith in the possibility that displacement/community stabilization can be measured.

Another work group member asked for clarification regarding community stabilization vs. affordability.

There was some further discussion about how active transportation will be included in the draft measures. One work group member suggested calling active transportation out as part of public health.

The final comments of the discussion of the draft transportation equity measures continued to reiterate the necessity for staff to boil down the measures which matters to communities and elected officials. There was also a discussion of the significance of storytelling that is needed as part of this work. Work group members also emphasized that staff recognize the different factors which can influence the draft transportation equity measures. Because the measures are framed as outcomes, recognizing the influences help to frame the work broadly and not in isolation.

The work group also gave Metro staff approval to move forward with further exploring the draft transportation equity measures and to bring back a discovery memorandum to the June meeting with staff recommendations.

## **VII. POTENTIAL PRODUCTS**

Due to time constraints, Ms. Cho proposed to the work group moving the Potential Products agenda item to the June work group meeting. The work group agreed to this proposal.



### **VIII. QUESTIONS AND ANSWERS/NEXT STEPS**

Ms. Cho walked through a preview of the material to be covered at the June and September work group meetings. She also walked through the homework assignments for the work group. She asked between the May and June work group meeting, for members to complete the following “homework” assignments:

- Report back to your people what was discussed at the work group meeting and bring any feedback.
- Review the forthcoming memorandum about the 2018 RTP Performance Targets.
- Lastly come prepared at the next work group meeting to make recommendations on the draft transportation equity evaluation measures for the 2018 RTP investment package.

### **IX. ADJOURN**

There being no further business, Ms. Cho and Mr. Higgins adjourned the meeting at 3:00 p.m.

*Meeting summary prepared by: Grace Cho, Transportation Equity Project Manager*

Meeting materials:

Item	Topic	Document Date	Description
1	Agenda	05/12/16	Meeting Agenda
2	Meeting Overview Memorandum	05/12/16	Overview of what is covered in the packet of materials and anticipated for the meeting.
3	Work Group Meeting 2 Summary	02/18/16	Summary of transportation equity work group meeting #2.
4	2018 RTP Status Report	04//16	Summary of 2018 RTP activities to date.
5	Updated Schedule	05/12/16	Updated schedule of Transportation Equity work group meetings.
6	Federal, State, and Regional Policy Overview Memorandum	04/06/16	Background information about federal, state, and regional policies which address transportation and social equity.
7	Memorandum Synthesizing Feedback, Findings, and Draft Measures	05/12/16	Overview of findings of community priorities and process for defining draft transportation equity measures.
8	Memorandum Outlining Potential Products	05/12/16	Overview of potential products to result from the Transportation Equity work.
9	Presentation	05/12/16	TE Work Group Presentation
10	Mtg. Evaluation	05/12/16	TE Meeting #3 Meeting Evaluation



**Performance Work Group Meeting #2**  
**April 25, 2016, 2:00 to 4:00 PM**  
**Metro Regional Center, Room 401**

**Committee Members Present:**

**Name**

**Affiliation**

Abbot Flatt

Clackamas County

Kelly Rodgers

Confluence Planning

Dan Riordan

Forest Grove

Kelly Clarke

Gresham

Don Odermott

Hillsboro

Karla Kingsley

Kittleson & Associates Inc.

Ken Lobeck

Metro

Jessica Berry

Multnomah County

Bill Holstrom

Oregon Dept of Land Conservation &  
Development

Jon Makler

Oregon Dept of Transportation

Phil Healy

Port of Portland, TPAC

Peter Hurley

City of Portland, TPAC

Lynda David

Southwest Washington RTC, TPAC

Chris Rall

Transportation 4 America

Eric Hesse

TriMet

Steve Kelley

Washington County

Steve Adams

Wilsonville

Denny Egner

Milwaukie

**Metro Staff Present**

John Mermin

Kim Ellis

Cindy Pederson

Jeff Frkonja

Lake McTighe

**Others Present**

Nick Kobel

## Meeting Overview

- John Mermin provided an overview of the agenda. He noted that Todd Juhasz from the City of Beaverton was a new member.
- He asked if there were any concerns being voiced from leadership or colleagues about the work thus far. No concerns were raised. John asked that to please let Metro staff know as soon as possible if there were concerns.

## Review Performance Measures Scoping Report

*John Mermin provided an overview of the content of the report and summarized major changes in the Scoping Report based on feedback such as:*

- Recommending that work group provides guidance for how locals should apply Interim Mobility Policy
- Note that mobility policies are being discussed across the country and that California has passed legislation not to use auto volume/capacity, but to use VMT instead.
- Clarifying that workgroup will make some recommendations in coordination with other work groups
- Adding in reference to Clean Air Act monitoring requirements
- Updating Virginia DOT Best Practice
- Clarifying how our process influences the next round of Regional Flexible Funding Criteria (in two years) rather than the one currently underway
- Adding a task to update definitions in RTP relating to performance measurement

## Work Group member comments:

- Not clear in the report how well that some of the PM are working and why or why not. More examples would be helpful. Staff noted that an upcoming report Transportation for America on performance measures would provide some additional information, and that a simplified matrix could be provided for TPAC at some point.
- For the mobility policy, jurisdictions would like whatever is adopted to also be used as the standard for development because it currently is different.
- Performance measures showing regional averages are challenging because different areas are not developed at the same level or have the same travel options. PMs for smaller geographies would be helpful. Staff noted that there are ongoing discussions, for example, of developing different mode share targets for different parts of the region. Staff also noted that smaller geographies was one impetus for the Mobility Corridors. It is challenging to provide system monitoring every two years, and there is a desire to use collected/observed data rather than modeled data.
- Member noted that a north-south mobility corridor west of 217 was needed. Staff explained that would be part of the monitoring discussion in 2017.
- While the region needs to be sensitive to the variability of different areas, this also needs to be done right. For example, if you assess PMs differently you may also need to develop different targets for different areas.
- Report is well done.
- Will there be increased discussion around equity? For example, if we look at congested VMT/capita, will we look at “which per capita?” is being impacted

*Jon Makler, ODOT Region 1 Planning Manager, provided an update on the Region 1 Highway Performance Project (see pg. 14 of the Scoping Report for brief description of the project)*

- Lainie Smith, who was managing the project, has retired.
- Some work group members had not heard about the project. A presentation was given to TPAC a few months ago.
- Process, so far, has been to brainstorm alternative measures and try out various scenarios in different test areas.
- Working with CH2M and have developed a preliminary safety PM. It will not be limited to freeways – would also apply to surface streets.
- Developing alternative PMs to volume/capacity (for the Portland region) and getting it adopted by the OTC will be a challenge. Concern about implications of having a different PM for the region, compared to the rest of the state.
- Focus of the project is currently on developing safety performance measure(s).
- Measure being considered: Relationship of the 95th percentile queue from an exit ramp terminal to the deceleration portion of that ramp, which is measured from the gore point. A short title might be “Exit Ramp Queue Length” and the criterion might be phrased as, “Does the 95th percentile queue extend into the deceleration portion of the exit ramp?” The deceleration portion is a function of assumed speed on the mainline. The metric can be evaluated empirically and can also be observed in simulation results but not in the regional travel demand model. It is only applicable at a freeway interchange; ODOT is also working on the analogous measure for an arterial intersection.
- FHWA webinars on congestion provide helpful information.
- Member noted that it is difficult to model congestion impacts of smaller projects that demonstrate a positive cost-benefit ratio for developers.
- Member noted that changing to VMT, as seen in California, is proving to be much simpler than modeling congestion.

## **Recap of April 22 Regional Leadership Forum & Regional Transportation Snapshot**

### **Next Steps**

*Kim Ellis provided an overview of the Regional Snapshot, now on Metro’s website, and the April 22 Regional Leadership Forum*

*Work Group member comments:*

- Attended the leadership forum and appreciated that there was big thinking and not being constrained by funding, but didn’t hear any of the speakers/report backs talk about projects. Kim responded that that was on purpose – the idea was to get leaders thinking about big issues and possible big solutions, and then, later down the line, have them determine how to transform those big ideas into policies and projects. John Mermin also noted that another purpose of the forum was to bring in new community and business leaders (beyond the “usual suspects”) to the table and engage them so they can help inform and shape the policy direction that will guide updating the RTP project list and investment priorities in 2017.
- Question about the data in the snapshot for number of trucks over the Columbia River. Staff noted that the data used in the snapshot was from ODOT.

## **Review of 2014 RTP and Climate Smart Strategy performance with adopted Performance targets**

*Cindy Pederson, Principal Researcher and Modeler in Metro’s Research Center, provided an overview presentation of findings from preliminary modeling of the different scenarios. She*

*provided background on the assumptions of the model and outcomes (see PPT). Jeff Frkonja noted that it is important to keep in mind the distinction between forecast/modeled data and observed/collected data.*

*Work Group member comments:*

- Excited to see hourly breakdowns to better understand what is occurring throughout the day and to what degree that the peak period is spreading.
- Clarification that the “strategic” scenario is what is also referred to as the “state” scenario in the 2014 RTP.
- When will the regional system modeling show congestion not on just on one link and use the Dynamic Traffic Assignment? It is challenging to validate and target investments when only some parts of the system are shown as congested. Staff replied that the Dynamic Traffic Assignment model will not be used in the 2018 RTP and that work continues to transition to the regional activity-based model called DASH.
- When will Metro be using an Activity Based Model? Not in 2018 RTP. Staff will start to work with it, get training, and evaluate it before determining application in the coming year.
- Are we falling short of our targets, even though the adopted Climate Smart Strategy demonstrated we were meeting GHG targets? Staff responded that the analysis tool used in the climate smart effort, Green Step, was developed specifically to test GHG emissions reductions. The analysis presented today is based on an analysis using the regional travel demand model, which accounts for different factors GreenSTEP.
- Do we not have the right measures, or are we not capable of meeting our targets. What does it take to actually meet the targets? It would be helpful to test what it would take as we develop the PMs and targets. Staff responded that they would report back at the next meeting on what type of analysis could be conducted within the timeline and resources.
- We need to ask how aspirational should we be when setting our targets?
- It is important when we set targets or goals not to be limited by the data or tools used to measure them.
- How we report the data sometimes takes more effort than developing it because the message is so important.
- The current scenarios do not show a high return on investment for transit. How does GreenStep differ? Staff responded that Green Step and the Climate Smart Strategy analysis showed significant economic benefits associated with health, safety, household and business cost savings, etc. The RTP scenarios do show an increase in transit use, though not meeting the target to triple transit mode share. Staff reminded the work group that tripling mode share is one of several aspirational targets in the current RTP being reported today and shouldn’t be looked at in isolation. The purpose of the work group to look carefully at the targets and PMs to recommend adjustments.

### **Next Steps**

*John Mermin provided next steps and adjourned the meeting.*

Next steps relating to transportation modeling:

- Continue documenting 2014 RTP system performance data
- Begin review of draft Federal performance rule
- Explore new ways to measure congestion
  - Consider new definitions/thresholds

- Take advantage of the 24 1-hour assignments
- Develop system reliability measure(s)

Next Steps for work group:

- Next meeting June 27, 2pm
  - Begin discussion of refinements to measures
- Continue to keep your colleagues informed of this work

*Meeting summary prepared by Lake McTighe*







**Safety Work Group Meeting Summary**  
**(Draft until approved by work group)**  
**May 20, 2016, 9:00 AM to Noon | Metro Regional Center, Room 270**

**ATTENDED (Work Group):**

Becky Bodoyni, Multnomah County Health  
Anthony Buczek, Metro  
Tegan Enloe, Hillsboro  
Nick Fortey, FHWA  
Todd Juhaz, Beaverton  
Tom Kloster, Metro  
Joe Marek, Clackamas County  
Lake McTighe, Metro  
Jeff Owen, TriMet  
Amanda Owings, Lake Oswego  
Lidwien Rahman, (alternate for ODOT/Oregon Walks)  
Kari Schlosshauer, SRTS National Partnership  
Chris Strong, Gresham  
Aszita Mansor, Multnomah County  
Dyami Valentine, Washington County  
Clay Veka, Portland

**ATTENDED (Interested Persons/Metro Staff/ Invited Guests):**

Nancy Murphy (ODOT, presenting on draft TSAP)  
Charlie Tso  
Clint Chiavarini, Metro  
Jamie Snook, Metro  
Grace Cho, Metro  
John Mermin, Metro  
Alexa Todd, Metro  
Peggy Morell, Metro

**Follow-up actions**

- ✓ Provide work group with information on Portland, Clackamas County and Oregon Safety Action Plans, including public comment dates for Oregon TSAP
- ✓ Provide work group with information on alternate methods to set speeds
- ✓ Investigate how to access ODOT's weekly "preliminary fatal list" and 3-month batches of fatal and injury reports – provide work group with information
- ✓ Meet with TriMet and determine if work group can provide timely input on BeSeen campaign
- ✓ Invite ODOT crash analysis staff to present at upcoming work group meeting to talk about crash data analysis process and proposed changes to speed up data availability

## **Welcome & Overview**

Tom Kloster, meeting chair, welcomed the workgroup and emphasized its importance due to the increased attention to safety from elected officials and the public.

Lake McTighe, safety work group lead, recapped the agenda for the meeting.

## **Work Group member introductions**

Work group members introduced themselves and shared outcomes they'd like to see come out of the Regional safety work group. Themes included:

- A collective, regional safety vision
- Consistency in safety plans around the region
- Clarifying the role of Metro in safety planning
- What goals we want to set regionally
- Common goals that address diversity of communities
- Develop broad regional support for agencies to move forward
- Forecasting future safety outcomes
- Lend legitimacy to achieving safety
- Influence local engineers
- Influence local safety action plans
- Performance measures & implementation strategies
- Completion of city, state, region benchmarks
- Systemic countermeasures that address prevalent trends
- Better understanding of funding sources for safety
- Look at other crash data, e.g. AAA, trauma
- Elevate conversation of tradeoffs (frankly and honestly) of safety vs. other factors, e.g. speed, efficiency
- Recommendation for an updated (possibly more aggressive) regional safety performance target
- Clear guidance for local Transportation System Plans in the Regional Transportation Functional Plan
- Safety as a priority for funding
- Elevation safety as a priority outcome, e.g. safe routes to school
- Recognize safety anywhere people go (not just at hotspots)
- Tools that smaller communities can use – address safety as barrier to walking, bicycling
- Vision zero as a regional strategy
- Learning from / sharing resources with all the different jurisdictions in the room
- Improved safety for all users, with an emphasis for the most vulnerable communities

## **Safety Work Group purpose, charge and schedule**

Lake provided a brief overview of the purpose, charge and schedule for the work group and emphasized the workgroup as an informal venue to hash out ideas. Lake strongly encouraged members to reach out to their colleagues, elected officials, decision makers and others between meetings to help pull out the issues – identifying where the “rub” will be when trying to implement safety policies/projects.

## **Overview of regional safety trends**

Anthony Buczek provided an overview of the 2012 Regional Transportation Safety Plan and the workgroup that developed it.

During Q&A members made the following comments:

- When the updated plan goes back to JPACT it provides an opportunity to describe what the safety results have been since 2012 (when JPACT voted against funding a regional safety program) – need to show that it is important to be more aggressive.
- The workgroup should spend some time developing guidance to public education campaigns relating to safety, e.g. nighttime visibility which can be tricky to implement as sponsors may be accused of “victim-blaming.”
- Distinguish between “speeding” and “speed” which are different but can be blurred; higher posted speeds can result in death, even if people are not speeding. Using clear language is important.
- Be careful of a false dichotomy between mobility and safety, as it is possible for people to get where they want to go (access and mobility) safely; mobility does not necessarily mean “fast.”
- Interest in whether there are geographic concentration of regional crashes
- Interest in performance of impacts of rural road design (both within and outside the urban area).
- Need to get data faster. The ODOT data takes 1.5 years to be published.
  - Local police often provide weekly reports, but not all jurisdictions have the staff to compile, process and analyze these
  - ODOT sends out a weekly preliminary list of fatalities. (Not everyone was aware of this, so Lake will follow up and send out the contact info to the group).
  - Lake will ask if ODOT’s Salem crash unit staff to present to this workgroup and explain why it takes so long to get data published
  - ODOT is developing a process (for 2016 data) that will focus on fatal and severe crashes first and raise the property damage only threshold from \$1500 to \$3000 in order to get the data out quicker
- What levers can be addressed to influence safety. Which ones have the biggest impact? Which provide short term vs. long term impact? Would be good to provide that sort of impact analysis, ala the Climate Smart Communities Plan, to safety actions and strategies
- Consider qualitative ways to help decision-makers process safety-related actions – e.g. a star rating for different types of actions
- Re-examining the regional complete streets strategy and the desire to provide facilities that serve all modes; challenging to provide greater separation in some instances
- Many small actions add up to make an impact on safety
- Age may be a factor in crashes (drivers and pedestrians)
- Interest in role of other demographic factors, such as race and ethnicity

## **Status of recommended actions from the Regional Transportation Safety Plan (RTSP)**

Lake provided a brief overview of actions completed since the RTSP was adopted in 2012.

During this research Lake realized she’d like to get to more specificity for the actions, e.g. how often should jurisdictions perform crosswalk enforcement actions and which ones Metro should lead vs. local vs. state. She asked members to review this handout and consider if the region has been doing enough.

### **Policy context overview – what’s changed?**

Lake provided a brief overview of what safety related policies have changed at the federal, state and regional levels since the RTSP was adopted in May 2012 and mentioned that a full policy report will be completed in the future.

Federal – safety performance measures, more funding, continued focus on Toward Zero Deaths State – Draft Transportation Safety Action Plan, new guidance on how to implement the Highway Safety Improvement Plan (HSIP).

Regional – 2014 Regional Transportation Plan (RTP) updated safety performance target, Regional Active Transportation Plan (ATP) adopted, Climate Smart Strategy adopted.

Overall – more focus on safety, greater push to be more ambitious. Her overview also includes a summary of equity and public health. Some data suggest low-income and people of color are more susceptible to traffic fatalities/serious injuries.

A member suggested defining what is meant by equitable from a regional perspective and to use the City of Portland’s Vision Zero work as a starting point.

Lake asked members to send her any comments, edits on the Policy context overview memo, which will be finalized in a Policy Framework Background Report

### **Understanding Vision Zero/Towards Zero Deaths**

To orient the group Lake played a video from the Rhode Island DOT with interviews of the public regarding setting a target, showing the progress of their thinking of what a reasonable fatality target is in the abstract vs. when asked what the target should be for their own family (“Zero”!)

### Oregon – Transportation Safety Action Plan (TSAP), Vision Statement

Nancy Murphy from ODOT presented on the Vision Zero statement in the draft Transportation Safety Action Plan. She described the emphasis areas and example actions: infrastructure, risky behaviors, vulnerable users, improved safety. Members commented about the need for road cross sections to be changed to achieve a desired speed before trying to lower the speed limit. ODOT commented that in the past the state had to set the design speed 10 mph above the posted speed, but now it can set it at the same mph as the posted speed. Another member mentioned FHWA guidance that points to other methodologies to set posted speed limits, in addition to using the 85<sup>th</sup> percentile method. Nancy noted that the public comment period for the draft TSAP will be 6/16 to 8/1 and encouraged members to send in comments.

### Clackamas County – Driving Towards Zero

Joe Marek presented on the County’s TSAP, adopted in 2012 – the first in the state; will be updated in fall 2016. It includes the target to reduce fatal & serious injury crashes by 50% and ultimately to zero. It takes a broad approach (4 E’s) not just engineering. It recognizes the need for culture change, outreach to schools, social services, public messaging on buses and in libraries, behavioral health, juvenile department, and housing authority. It includes 3 main policies – healthy people, safe roads, vibrant economy. The County restructured the budgeting process and created three departments, safety, capital and maintenance – reflecting County’s prioritization of safety. Work group members asked about balancing engineering and health/environment. Joe gave the example of the County doing a road safety audit and an HIA, to guide engineer’s decisions.

### City of Portland - Vision Zero

Clay Veka presented on the City's Vision Zero project, including the following vision statement: "Working together, we will make equitable and data driven actions that will eliminate deaths & serious injuries for all who share Portland streets by 2025." A task force developed the vision statement last fall. There was debate about the urgency – landing at 10 years, since 20 years seemed not urgent enough. The actions will be available for review in the next few weeks. This Fall the final plan will be up for adoption. The current challenge is narrowing the list of actions. A member commented that it was great to see equity included in the City vision statement and noted that it's been a challenge for the State to definite equity in a way that is understandable to all parts of the state. A member suggested defining equity in terms of safety.

### **Discussion and direction on regional safety target**

Lake asked members to provide words, elements, qualities, etc. that should be included an updated Regional safety target.

- Fatal/severe
- Zero
- Aggressive driving
- Date (aggressive date)
- Youth/older adults
- Historically underrepresented communities
- Interim targets
- Data driven
- Risk factors (including the crash that didn't happen)
- Speed (not speeding)
- Risk exposure
- Monitoring
- Safety culture
- "All who share the roads"
- Years of life lost
- Design of infrastructure
- Proactive
- Health
- Equity
- What's in it for me (getting to changing the culture)
- Education
- Place
- Inspire
- Prioritizing
- Measureable/measurements
- Innovation beyond standards
- Reduce conflicts
- Awareness
- Recognizable
- Envision safety
- Infrastructure influencing behavior

Lake asked members to describe challenges, opportunities, and concerns around setting a target of zero.

- Compassion and non-judgmental
- Strategic vs. hot spot fixes
- Cocoon nature of autos
- Data driven/proactive vs. emotion/media driven (where to focus resources)
- Trade-offs
- Marketing/branding
- Emerging technologies
- Procurement/government contracts (allowing for pub-private partnerships)
- Appropriate community involvement
- Jurisdictional control
- Policies and goals vs. decision making
- Institutionalizing
- Relationship of politics-public-decision makers
- Innovations beyond standards
- Fear
- Politics
- Liability
- Data (Focus, lack of accuracy, missing, hidden)
- Cost to implement
- Accountability
- Competing priorities
- Diversity of region
- Deferral/putting it off
- “Crashes are a part of life” attitude
- Assuming that technology will fix it
- Mobility standards
- Getting there fast
- Human factors
- Cultural shift

#### **Next steps and adjourn**

Lake described next steps and asked members to email her with feedback on the meeting if they don't have time to fill out a feedback form.

*Meeting summary prepared by John Mermin*



Living there  
with equitable  
housing choices

## Equitable Housing Planning & Development Grants

Promoting equitable housing means ensuring **diverse, quality, affordable housing choices with access to opportunities and amenities.**

The Metro Council seeks to inspire and foster innovative projects that support the creation of *equitable housing*—defined as diverse, quality, physically accessible, affordable housing choices with access to opportunities, services and amenities.

Local governments can adopt regulatory and administrative reforms, create incentive programs and partner with developers to eliminate barriers to equitable housing development on a specific site or in a general area.

As a subset of Metro’s Community Planning and Development Grant program, Metro’s Equitable Housing Planning and Development Grant (“Equitable Housing Grant”) program will make \$500,000 available in 2016 to support local planning to eliminate barriers to equitable housing development.

Funding is made possible by a regional construction excise tax.

### Who is eligible?

Cities and counties within the Portland regional urban growth boundary can apply for grants, either solely or in partnership with other government entities, nonprofit organizations or businesses.

Proposed projects must fulfill the following minimum requirements to be considered:

- The total grant request must be between \$50,000 and \$100,000.
- The proposed use of grant funds must be for planning and development; grants cannot be used to support general budget needs, construction or operating costs.
- Applicants must match grant funds with outside funding or in-kind services equivalent to 10 percent of the grant request.
- Applicants must provide a letter of endorsement from a governing body.
- See next page for eligible projects and evaluation criteria.

### Timeline, website, contact

Letters of interest are due June 8, 2016, with full applications due August 12, 2016. The Metro Council will award grants in the fall.

Find the application handbook:  
**[oregonmetro.gov/housinggrants](http://oregonmetro.gov/housinggrants)**

Questions? Contact Emily Lieb, program manager: 503-797-1921 or [emily.lieb@oregonmetro.gov](mailto:emily.lieb@oregonmetro.gov).

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

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

**Metro Council President**  
Tom Hughes

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Carlotta Collette, District 2  
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[www.oregonmetro.gov](http://www.oregonmetro.gov)

## Examples of eligible projects

Grants will be administered in accordance with the code and administrative rules that currently govern the CPDG program. Eligible Equitable Housing Grant projects fall into two categories:

- 1) Opportunity site identification and analysis: Conduct predevelopment work on potential affordable or mixed income housing development sites in centers and corridors (as identified in Title 6 of Metro's Urban Growth Management Functional Plan)

*Examples of potential projects:*

- *site identification*
- *environmental analysis and brownfield site assessments*
- *financial feasibility analysis and funding strategy development*
- *parking analysis*
- *schematic design*

- 2) Policy evaluation and implementation: Conduct evaluation and develop tools to support modification of local code, zoning or permitting processes or create incentives that eliminate barriers to equitable housing development.

*Examples of potential projects:*

- *zoning/code changes to eliminate barriers to the development of "missing middle" housing and creative infill housing, such as accessory dwelling units or cottage clusters*
- *evaluation and implementation of a regulatory or incentive program, such as Vertical Housing Tax Credits, tax exemptions for affordable units, or inclusionary zoning*
- *implementation of streamlined permitting for affordable housing*

## Criteria

Project proposals will be evaluated based on how well they achieve the goals of the Regional Framework Plan, which identifies regional policies to implement the 2040 Growth Concept.

Criteria include the following.

- expected development outcome
- regional significance
- ability to support vibrant Centers, Corridors, and Main Streets
- addressing the needs of underrepresented or underserved groups (equity)
- use of best practices
- leveraging past or future public and private investments, such as transit projects
- available matching funds
- absorbing projected growth in the community
- public involvement
- commitment for action by a governing body
- capacity of applicant

For detailed descriptions, download the handbook: [oregonmetro.gov/housinggrants](http://oregonmetro.gov/housinggrants)





Metro

June 2016



# Strategic plan to advance racial equity, diversity and inclusion

# ACKNOWLEDGMENTS

Many people and organizations have assisted Metro staff and contributed to the creation of the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. The Metro Council, initiated the process that culminated in this Strategic Plan in 2010, when it adopted six desired outcomes for the region, including equity. Throughout these six years, the Council has approved funding and supported the agency's equity work. Metro staff at all levels, from leadership to line, have also actively and enthusiastically labored to establish equity as a priority for the agency.

From the inception of the equity strategy program in 2012, Metro partnered with, meaningfully engaged and received significant support and guidance from community, business, philanthropy and jurisdictional leaders and stakeholders. Numerous community members participated in all aspects of the equity strategy work. The members of the Equity Strategy Advisory Committee, who have been supporting Metro's equity work since 2013, deserve special recognition.

Metro expresses its profound gratitude to the following community members, organizations, stakeholders, elected leaders and staff that lent their time and talent to create this Strategic Plan. We apologize if we have unintentionally omitted any names and welcome your additions:



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And all the staff members who attended conversations and presentations related to the Strategic Plan to Advance Racial Equity, Diversity and Inclusion.

### **Former staff**

Kathryn Sofich, Michael Jordan, Mike Hoglund, Molly Vogt, Nuin-Tara Key, Pietro Ferrari and Pamela Phan

## FOREWORD

Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion is a major milestone in the agency's efforts to define, implement and measure equity in the Portland metropolitan region. In 2010, the Metro Council adopted equity as one of the region's six desired outcomes. The Metro Council launched the effort to develop a strategic approach to incorporating equity into policy, decision-making and programs in 2012. This Strategic Plan is the culmination of thoughtful, collaborative work, and also a call to action.

Guided by input from many regional partners and informed by research, Metro has identified racial equity as the approach to ensure that all people who live, work and recreate in the Portland region have the opportunity to share in and help define a thriving, livable and prosperous region. Places that work persistently to address the barriers faced by people of color are more successful than those that do not. They have stronger economies, greater well-being and richer civic lives – and all people benefit as a result.

People of color represent a growing share of the Portland region's population. They also experience worse outcomes in every indicator of social well-being. It is imperative to the region's economy and quality of life, as well as Metro's effectiveness as a public agency, that Metro update its policies, practices, programs and activities to better serve people of color.

Metro involved community members and community-based organizations at every step in the creation of this equity strategy.

The Equity Strategy Advisory Committee, leaders from the philanthropy, non-profit, public and business sectors, advised the Metro Chief Operating Officer and equity strategy staff throughout the creation of this Strategic Plan.

Six local community-based organizations created a framework for Metro to understand and measure equity in the region. Community-based consultants and organizations partnered with Metro staff to engage members of local communities of color and youth to complete the draft Strategic Plan and prioritize the proposed objectives and actions.

This strategy will continue that track record. Metro will continue working directly with community-based organizations to co-create strategies, engage culturally specific communities, and build capacity in organizations that represent communities of color.

We are excited that in 2016 Metro will formally move into the implementation of this strategy. Everyone in the Portland metropolitan region should benefit from quality jobs, stable and affordable housing, safe and reliable transportation, clean air and water, and a healthy environment. This strategy is a critical part of making sure that happens.

We invite you to join us in this journey.

*Tom Hughes*  
Tom Hughes  
Metro Council President

*Martha Bennett*  
Martha Bennett  
Metro Chief Operating Officer

*Carl Talton*  
Carl Talton  
Equity Strategy Advisory  
Committee Chair



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## Introduction

### Why racial equity?

Metro works to improve the quality of life for the Portland metropolitan region's 1.5 million residents by providing land use and transportation planning; entertainment, educational and convention-related venues; parks, natural areas, cemeteries and outdoor recreation facilities; and recycling and garbage services.

Like most of the nation, the Portland region's communities are becoming more diverse. It is projected that by the year 2045, communities of color will be the majority.

Our current and future diversity will help develop and maintain sustainable economic growth if we proactively address the issue of equity. Research shows that regions that attain more economic growth are those with greater racial inclusion and

## QUICK GLOSSARY

### Racial equity:

Race can no longer be used to predict life outcomes and outcomes for all groups are improved.

smaller racial income gaps<sup>1</sup>. Unfortunately, most communities of color in the Portland metropolitan region currently experience the worst economic and social outcomes of any demographic group, due to a long history of exclusionary and discriminatory policies.

To prepare for a healthy and prosperous future, Metro, other jurisdictions, community organizations and the business and philanthropic communities are taking a long, hard look at equity. Advancing racial equity will allow Metro to more effectively serve all communities. It's not only the right thing to do; it's the smart way to improve our present and plan for our future.

1 Treuhaft, S., Blackwell, A.G., & Pastor, M. (2012). America's Tomorrow: Equity is the Superior Growth Model. Retrieved January 2016: [http://www.policylink.org/sites/default/files/SUMMIT\\_FRAMING\\_WEB\\_20120110.PDF](http://www.policylink.org/sites/default/files/SUMMIT_FRAMING_WEB_20120110.PDF)

## AT A GLANCE

### Racial disparities

As the Portland metropolitan region's demographics change, Metro needs to plan for the future by addressing long-standing institutional barriers that inhibit success for all. Through its programs, policies and services, Metro is committed to creating conditions which allow everyone to participate and enjoy the bounty of the region for generations to come.

This commitment is tempered with the recognition that people of color across the country experience the most disparate outcomes in nearly every category of social well-being, including housing, transportation, access to nature, education and health.

This situation is no different for the communities in the Portland metropolitan region. Sources such as the Regional Equity Atlas, A Community of Contrasts, Communities of Color in Multnomah County: an Unsettling Profile, the Greater Portland Pulse and the State of Black Oregon clearly show the extent of these disparities, from educational to health outcomes.

## A focus on racial equity supports all

The Strategic Plan to Advance Racial Equity, Diversity and Inclusion, referred to hereafter as the "Strategic Plan", is the culmination of Metro's efforts to articulate how the agency intends to advance equity in its crucial work in the Portland metropolitan region.

Metro will concentrate on eliminating the disparities that people of color experience, especially in those related to Metro's policies, programs, services and destinations. People of color share similar barriers with other historically marginalized groups such as people with low income, people with disabilities, LGBTQ communities, women, older adults and young people. But people of color tend to experience those barriers more deeply due to the pervasive and systemic nature of racism. **By addressing the barriers experienced by people of color, we will effectively also identify solutions and remove barriers for other disadvantaged groups.** The result will be that all people in the 25 cities and three counties of the Portland region will experience better outcomes.

This strategic direction allows Metro the opportunity to make a difference in the lives of disadvantaged communities while having a positive impact on the Portland region's overall quality of life.

The Strategic Plan focuses on removing barriers and improving equitable outcomes for people of color. At the same time, Metro's Diversity Action Plan, approved by the Metro Council in 2012, will continue to remove barriers for low income, people with disabilities, LGBTQ communities, women, older adults and young people.

The Diversity Action Plan and this Strategic Plan, both facilitated by Metro's Diversity, Equity and Inclusion (DEI) Program, will continue to coordinate efforts, create synergies and eliminate duplication to meet the agency's obligation to effectively serve all communities in the region.





Many times the burden of implementing equity, diversity and inclusion strategies in institutions falls on the shoulders of employees who belong to historically marginalized communities. Metro is committed to making sure that advancing racial equity in the agency becomes the responsibility of *all* its elected officials and staff, in partnership with communities of color.

This Strategic Plan intends to be iterative. The following sections contain Metro’s current best effort to create the methodology and the practice of institutional and structural change to eliminate racial disparities. As the Strategic Plan is implemented, it will reveal further opportunities for adjustment and improvement. Future strategic plans will build on the successes and lessons of this first iteration, but Metro’s commitment to advancing racial equity will remain constant.

### MEAN PER CAPITA INCOME

American Indian or Alaskan Native	\$19,232
Black or African American	\$19,264
Native Hawaiian or Pacific Islander	\$16,663
Asian	\$29,054
Hispanic or Latino	\$14,591
White	\$33,510
Two or more races	\$16,021
Some other race alone	\$13,667

Chart 1 data: Portland metropolitan region 2009 - 2013 ACS 5-year

### PERCENT BELOW POVERTY LEVEL

American Indian or Alaskan Native	27%
Black or African American	34.1%
Native Hawaiian or Pacific Islander	23.4%
Asian	12.5%
Hispanic	27.6%
White	10.9%
Some other race	31.7%

Chart 2 data: Portland metropolitan region 2009 - 2013 ACS 5-year

## QUICK GLOSSARY

### Metro’s working definition of equity:

Our region is stronger when all individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources that enhance our quality of life.

We share a responsibility as individuals within a community and communities within a region. Our future depends on the success of all, but avoidable inequities in the utilization of resources and opportunities prevent us from realizing our full potential.

### Historically marginalized:

Groups who have been denied access and/or suffered past institutional discrimination in the United States.

### Inclusion:

The degree to which diverse individuals are able to participate fully in the decision-making process within an organization or group. While a truly “inclusive” group is necessarily diverse, a “diverse” group may or may not be “inclusive.”

## AT A GLANCE

### **The generalization of race data may misrepresent the conditions in communities of color**

Much of the data that is utilized to examine racial equity conditions in the Portland metropolitan region, and around the country, originates from the U.S. Census Bureau's decennial census and the American Community Survey (ACS). The dependence upon these datasets has created various issues when trying to shine an accurate and inclusive spotlight on the state of equity within a place or a community. One of the most significant causes of these issues is the way in which the U.S. Census Bureau categorizes race and ethnicity.

The U.S. Census Bureau uses six general racial categories and one ethnicity category within their surveys:

- Race – (American Indian or Alaska Native; Asian; Black or African American; Native Hawaiian or Pacific Islander; White non-Hispanic; Some other race)
- Ethnicity – (Hispanic or Latino)

Due to the general nature of these race/ethnicity categories, the data collected may misrepresent actual circumstances. The following two examples highlight the significance of this issue in greater detail:

1. **Large racial categories.** The racial categories used by the U.S. Census Bureau combine many different communities and cultures into single categories, establishing an assumption that all the combined groups experience the same circumstances. Using the Asian category as an example, there are considerable differences between the various communities in this category. Generalizing these cultures and communities into one group creates substantial misrepresentations that may lead to distorted conclusions.

For example, imagine that the Asian category was made up of three communities of equal size who have different experiences when it comes to owning a home. One community is experiencing very low homeownership rates while the other two are experiencing very high homeownership rates. The resulting data would show an above average homeownership rate for the Asian category, which would be a distorted conclusion for roughly a third of the category's members.

This simplified example demonstrates how the creation of one, large category for many different communities and cultures can easily lead to data that misrepresent the current conditions of many specific communities. In this case, the data would show that homeownership is strong within the Asian community. However, it would fail to highlight the large disparities that the one community is facing which could prevent that community from receiving the attention that it needs.

This issue is not limited to the Asian category. The same generalizations take place within all of the racial categories. Even within the White category, the vast disparities that the Russian speaking Slavic communities face tend to be minimized because their data outcomes are combined with the general White population.

2. **U.S. Census Bureau sets the standard.** Although the U.S. Census Bureau's decennial census and the ACS are only two data sets, the racial categories set by these data sets are viewed by many as standard practice. Therefore, a majority of the data that are used to uncover equity disparities in the Portland metropolitan region use the same racial categories which amplify the generalization issue highlighted above.

To ensure that Metro addresses these potential data pitfalls, the Equity Baseline Workgroup in its Equity Framework Report (see Appendix A) recommended that Metro engage in the following practices:

- When collecting and/or analyzing data, disaggregate racial and ethnicity categories as much as possible.
- Use several forms of data, including qualitative (e.g. stories), to assess whether the community conditions are appropriately represented.

Metro has taken the first step toward improving its collection of race and ethnicity data by creating an initial set of standardized demographic questions and categories that will be used across the agency (see action on page 40). Once this first step is fully implemented, Metro staff will continue to expand its demographic data collection categories so that all communities, ethnicities and cultures can be uniquely portrayed.

## About this document

This Strategic Plan has several important elements:

1. *The Strategy:*  
Metro will utilize several interlocking approaches that will lead to long-term institutional and structural change.
2. *Goals, objectives, actions:*  
Five long-term goals that will advance racial equity at the institutional and structural level. Each goal contains several objectives that can be achieved within a five-year horizon. Each objective contains several related action items.
3. *Implementation vision:*  
A preliminary vision of an implementation structure that includes participation of community members and Metro staff from different departments, venues, and levels of responsibility in the agency.
4. *Evaluation framework:*  
A participatory evaluation approach to measure Metro's efforts to reach the five goals listed in this Strategic Plan. The evaluation approach includes mechanisms for community and staff stakeholders to be directly involved in each stage of the evaluation process and will use a combination of quantitative and qualitative methods.
5. *Analysis and decision-support tool:*  
An outline of an analysis and decision-support tool that will be piloted and then used to incorporate racial equity into existing and future policies, programs, procedures and services at Metro.
6. *Relationship between racial equity, diversity and inclusion:*  
Metro understands racial equity, diversity and inclusion to be interconnected strategies to ensure that all people in the Portland metropolitan region have the opportunity to reach their full potential. This section explains how this Strategic Plan relates to other efforts in these areas, such as the Diversity Action Plan adopted in 2012. See section "Diversity Action Plan Integration" (p.58) for more information.

The Strategic Plan builds on the extensive equity work that Metro departments and venues have been conducting for a number of years. Moving forward, the Strategic Plan will provide a unified strategic direction and additional focus for the crucial equity work currently underway at Metro, both agency-wide and in specific departments and venues.

## QUICK GLOSSARY

### **Diversity:**

The variance or difference among people. This variance includes race, ethnicity, gender, age, religion, nationality, language preference, socioeconomic status, disability, sexual orientation, gender identity and others. These differences are tied to a variety of other aspects of diversity such as experience, work styles, life experience, education, beliefs and ideas.

### **People of color and communities of color:**

For the purposes of this plan, communities of color are Native Americans, African Americans, Asian Americans and Pacific Islanders, Latinos or Hispanics, and immigrants and refugees who do not speak English well, including African immigrants, Slavic and Russian speaking communities, and people from the Middle East.

### **Institutional:**

The ways in which policies and practices within and across an institution interact, intentionally or not.

### **Structural:**

The ways in which public policies, institutional practices, cultural representations and other norms interact.

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## Where is Metro going?

### The destination

Metro is committed to inspire, teach and invite people, businesses, nonprofit organizations and public partners to arrive at a Portland region where:

- All individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources.
- Metro and other public agencies recognize that racial equity is a cornerstone of good governance to ensure the success of everyone, especially historically marginalized communities, by working together to end the avoidable inequities that prevent the realization of an individual's full potential and are detrimental to us collectively.
- Public structures, institutions and processes have evolved to address social and economic disparities for people of color that are rooted in our history of public decision-making.
- Diversity is celebrated and all communities are meaningfully engaged in public decision-making.

Metro recognizes that this vision will require significant organizational and culture change for the agency and is committed to undertaking that effort.

## EQUITY AND EQUALITY

**Not everyone needs glasses to see. Those that do require glasses need specific prescription levels to enable them to see.**

- **Equality:** Believing that everyone should get the same glasses regardless of need or level of prescription.
- **Equity:** Understanding that some have greater visual difficulties than others, therefore only those that need glasses get them, with the prescription that fits each person's specific needs.

## QUICK GLOSSARY

### **Color-blind:**

The racial ideology that posits the best way to end discrimination is by treating individuals as equally as possible, without regard to race, culture or ethnicity. It focuses on commonalities between people, such as their shared humanity.

### **Racism:**

Conduct, words, practices or policies which advantage or disadvantage people based on their culture, ethnic origin or color. Racism is just as damaging in obvious forms as it is in less obvious and subtle forms, and is still called racism whether intentional or unintentional.

## Five Strategic Plan goals

### Goal A

Metro convenes and supports regional partners to advance racial equity

### Goal B

Metro meaningfully engages communities of color

### Goal C

Metro hires, trains and promotes a racially diverse workforce

### Goal D

Metro creates safe and welcoming services, programs and destinations

### Goal E

Metro's resource allocation advances racial equity

## Organizational goals

Metro is committed to ensuring that all people in the region have the opportunity to thrive in all aspects of social well-being, regardless of their background or zip code. This is both the purpose of good government and an economic necessity: to effectively serve all people. In order to achieve this goal, Metro has identified racial equity as its strategic direction, and has developed this Strategic Plan to be the blueprint for its implementation.

This Strategic Plan is built around five long-term goals. The goals are intentional guideposts that direct Metro in creating specific objectives, actions, and measures of evaluation and accountability as the agency works to help the Portland metropolitan region reach its equitable and prosperous destination. Each goal has

several related objectives and action items, contained in the tables starting on page 19.

Metro has the authority and ability to address many of the goals, objectives and action items unilaterally. Others will require collaborative effort with partners.

In addition, some action items can be implemented within Metro's current budget and work scope while others will require additional investment or realignment of resources, including staff time and funding. Metro is committed to investing in the additional effort needed to turn this plan into a functional implementation framework. The section titled "Metro department-specific action plans" on page 16 describes where much of the implementation thinking will take place.

## AT A GLANCE

### UNCOVERING RACIAL DISPARITIES

Structural racism is at the heart of inequalities experienced by communities of color and continues to create unsettling levels of disparity in social well-being. This is the culmination of the negative impacts produced by previous discriminatory practices and policies, perpetuated by persistent racist systems that people of color face every day. Previous exclusionary practices include redlining or voter discrimination. Current systems create gentrification and displacement, utilize racial profiling and impose disparate school discipline practices for students of color. Although racism often occurs at an interpersonal level, institutional and structural forms of racism create profound disparities and trauma that last generations. Trauma directly impacts the emotional, psychological, physical and economic well-being of an individual. It is an additional burden shouldered by people of color.

Since the landmark civil rights legislation of the 1960s, government has primarily used a color-blind approach to combat racial discrimination and establish a race-blind standard. This approach is founded on the well-intended idea of equality, which means that everyone receives the same treatment.

Unfortunately, equality assumes sameness – that everyone faces the same barriers. Equality does not take into account historical or current forms of discrimination that are present in our public institutions and structures, such as redlining, which prevented many people of color from owning property and accruing wealth, or predatory lending practices targeting communities of color.<sup>2</sup> As a result, color-blind policies have not reversed racial inequity. People of color continue to experience the worst outcomes.

Like other government agencies, Metro has historically used a color-blind approach, rooted in equality, for its decision-making. Therefore, Metro has been a direct and indirect contributor to many of the inequities that local communities continue to face.

Metro is committed to arriving at an equitable and prosperous Portland region where everyone has opportunities to enjoy a good quality of life. Taking a racial equity approach by removing barriers and increasing equitable outcomes for people of color in the region is the most intentional and effective path to get there.

<sup>2</sup> Badger, E (May 28, 2015). Redlining: Still a thing. The Washington Post. Retrieved: [www.washingtonpost.com/news/wonk/wp/2015/05/28/evidence-that-banks-still-deny-black-borrowers-just-as-they-did-50-years-ago/](http://www.washingtonpost.com/news/wonk/wp/2015/05/28/evidence-that-banks-still-deny-black-borrowers-just-as-they-did-50-years-ago/)

### HOMEOWNERSHIP BY RACE AND INCOME

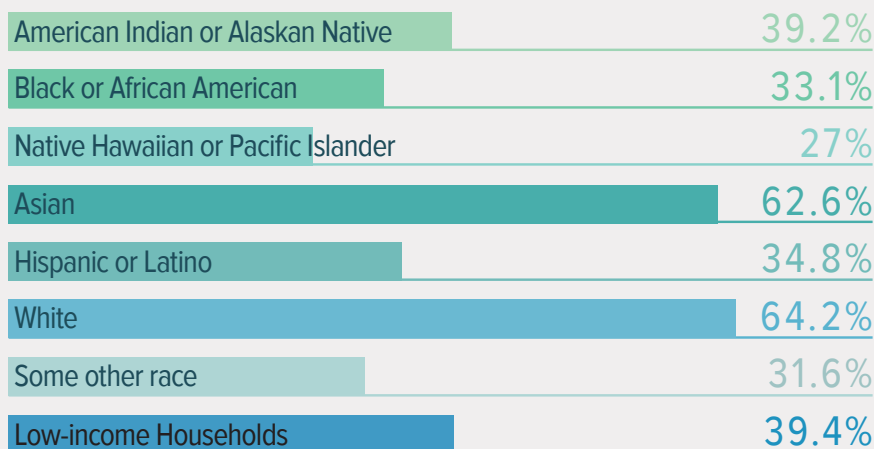


Chart 3 data: Portland metropolitan region 2010 U.S. Census

## Metro department-specific action plans

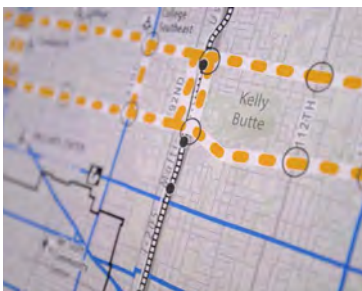
Beginning on page 19, this Strategic Plan presents five agency-wide goals and proposed actions to move Metro toward reaching each goal. The actions involve areas such as engagement, procurement, resource allocation, communications, hiring, retention and accessibility of facilities.

Metro is already working on many projects and programs that advance equity in the region. Examples include partnerships with community-based organizations to increase the racial diversity of Metro staff, offering support to minority- and women-owned small businesses to be better positioned to contract with the agency, and efforts to ensure that more people of color receive the benefits of parks, natural spaces and nature education programs. Metro understands that it needs to advance racial equity with a renewed sense of urgency because of the extent of the challenges experienced by communities of color. A

number of actions included in this Strategic Plan will be pursued immediately after its adoption. Metro departments and venues will also continue to undertake and advance their programs and projects that advance racial equity, while working to complete their own action plans.

These actions are not focused on specific programs, projects or services because a major recommendation of this Strategic Plan is for each Metro department and venue to develop its own equity action plan in partnership with community. During the first year following the adoption of this Strategic Plan, Metro will pilot the development of several department- and venue-specific equity action plans. After these pilots are completed, the rest of Metro's departments and venues will develop their own specific equity action plans.

With input from the community, directors and staff in each Metro department and venue are best positioned to identify additional actions that will have the greatest impact on racial equity, diversity and inclusion related to each of their programs, projects, services and plans. Departments are encouraged to coordinate their plans with other departments to ensure adequate resources, including central service support like Communications.





The development of each department and venue's action plan will be a multistep process involving staff and community stakeholders, with support from Metro's Diversity, Equity and Inclusion Program (DEI) staff. Each action plan will ultimately contain a list of concrete actions that the department and venue will commit to implementing and evaluating over the next five years.

Departments and venues will also use the Equity Framework Report to inform the development of their action plans. The Equity Framework Report is a Metro-commissioned, community-led report resulting from a yearlong collaborative effort conducted by six community-based organizations including 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 framework report presents foundational definitions and information that can guide each department and venue in more fully understanding its roles and responsibilities to address the barriers faced by communities and staff of color.

## Metro's five-year objectives and action items

Each of the five goals in this Strategic Plan encompasses several specific objectives with an associated list of action items. Each objective is set along a five-year horizon for completion, although there will likely be additional work remaining at the end of that period. The detailed lists of organizational goals, objectives and actions are summarized in the tables on pages 19 to 47.

These objectives and actions were identified and distilled from the results of the community, stakeholder and staff engagement conversations conducted by Metro councilors and staff, in partnership with community-based organizations.

Reflecting Metro's desire to be a continuous learning organization, this Strategic Plan's goals, objectives and actions will be periodically updated and modified as needed according to the results they achieve and evolving conditions in the Portland metropolitan region, future changes within Metro and other unforeseen events. The entire Strategic Plan will be updated in 2021, to coincide with the five-year implementation horizon of this initial plan.



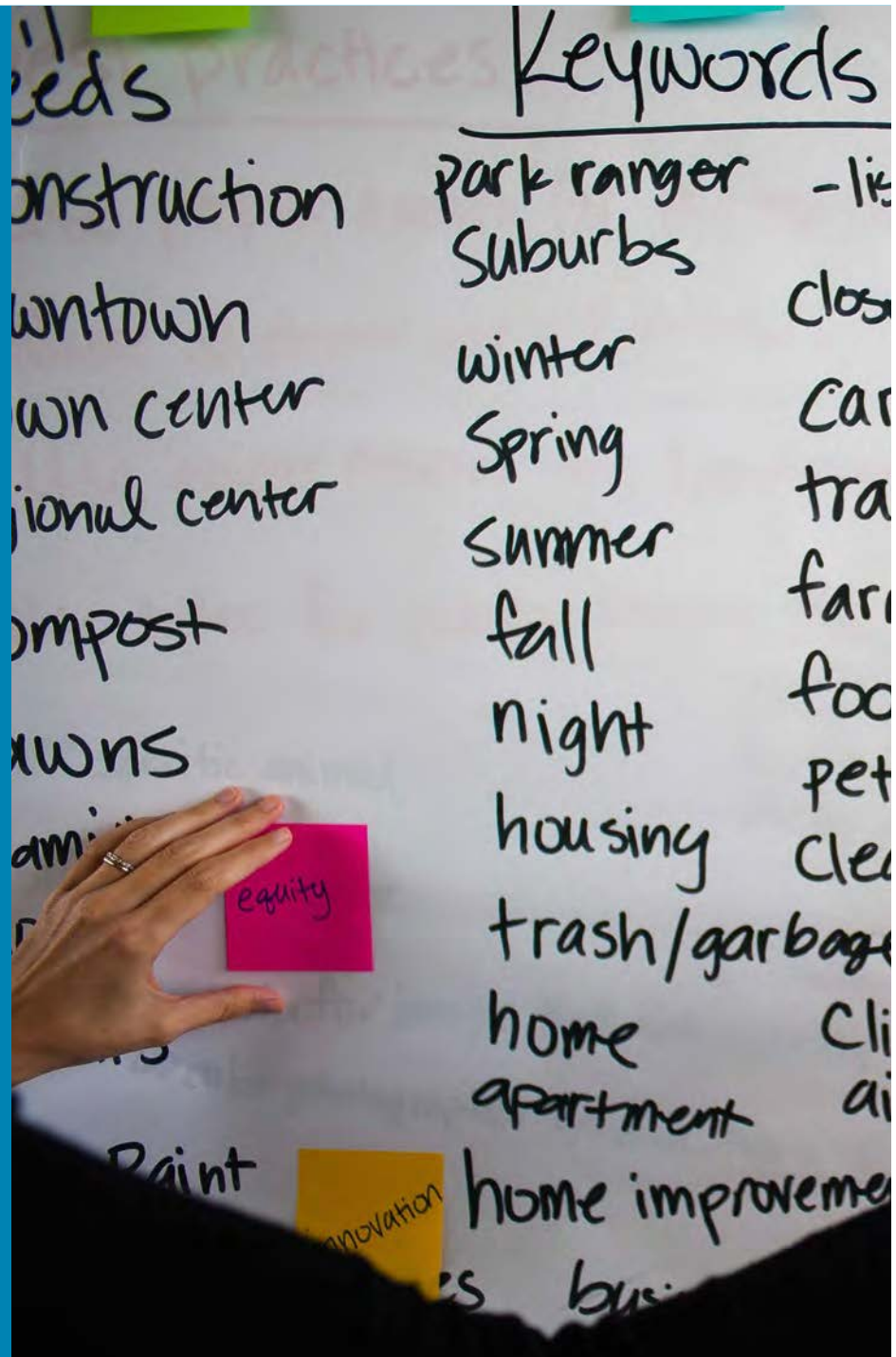
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## Goal A

Metro convenes and supports regional partners to advance racial equity

### GOAL STATEMENT

Metro brings together diverse partners from across the Portland metropolitan region to reduce racial disparities and improve outcomes in communities of color through coordinated and innovative approaches. Metro leads by convening decision-makers and providing research and technical support to assist local jurisdictions in equity initiatives. Metro also proactively convenes regional partners to support a racially diverse construction workforce.



## Goal A - Metro convenes and supports regional partners to advance racial equity

### QUICK GLOSSARY

**Community:**

All individuals who live, work, play or pray in the Portland metropolitan region.

### What does this goal mean for the community?

As a regional government, Metro is in a unique position to bring together public, private, philanthropic, and community partners throughout the Portland region to coordinate efforts to advance racial equity.

Metro will work collaboratively with partners to address a range of issues, including: improving access to government services and decision-making processes; building relationships; expanding workforce development to create strong employment pipelines for people of color; supporting the development of affordable housing to meet the urgent need for stable housing choices; ensuring accessible, safe and affordable options for travel; managing the regional solid waste system in ways that improve access to service and create benefits; and operating parks so that health-promoting natural areas are preserved and made culturally accessible for all. Additionally,

Metro will also assume a regional leadership role to bring together partners to coordinate investments and create new employment pipelines through internships, apprenticeships, resources and training, helping increase the number of minority-owned and, women-owned small businesses in the Portland region, as well as skilled professionals of color in the construction trades. This objective is directly related to Goal E: Metro's resource allocation advances racial equity.

### What does this goal mean for Metro staff and leaders?

By implementing the objectives and actions included in this goal, Metro staff will contribute to creating a region where all residents have the opportunity to realize their full potential. Metro will strengthen partnerships and take a leadership role in breaking down the silos between regional partners that prevent the coordinated advancement of racial equity in the areas of community involvement, workforce development, affordable housing, transportation, solid waste management and parks/natural areas. Metro staff will enhance their current work providing research and technical support to regional and local partners. Additionally, Metro will assume a leadership role in strengthening cross-regional partnerships to expand the number of minority-owned and women-owned small businesses in the Portland region, as well as skilled professionals of color in the construction trades.



## CONVENING REGIONAL PARTNERS TO ADVANCE AFFORDABLE HOUSING

On Feb. 1, Metro convened regional leaders for its Equitable Housing Leadership Summit, a chance to learn and share information about ways to improve our region's affordability.

The keynote speaker, Seattle Mayor Ed Murray, talked about lessons Portland can learn from the Northwest's largest city. Both cities are grappling with an affordable housing crisis.

Seattle stakeholders reached an agreement to institute a commercial development fee to fund the construction of new affordable housing, and a requirement for developers to include affordable housing in any new development or pay a fee to build it elsewhere. The agreement also includes allowing higher density in some neighborhoods called "urban villages".

The Seattle City Council passed the deal in November, though it must be implemented through an update to the city's zoning codes.

That process, expected to be contentious, will take place through 2016.

Murray said a key factor in the success of Seattle's effort so far was requiring a simple thing of all participants.

"Both sides wanted to go into that room with the condition that certain things could not be on the table," Murray said. "But my condition was that if you were going to be at this table, you had to be open to listening to anything."

More than 200 attendees represented government, developers, nonprofits and businesses from around the region. Over several hours of panels, small group discussion and presentations, they dug deep into a challenge that has been called a state of emergency by advocates and local and state officials.

## Goal A - Objectives and actions

### Objective 1: Convene regional partners to advance coordinated regional equity efforts.

CHALLENGE	ACTION	START YEAR
Jurisdictions have limited opportunities to work together to reduce engagement burdens on communities.	In partnership with the community, develop and pilot regional public engagement forums to connect Community-based organizations to resources, engagement opportunities, contracting opportunities and staff at Metro and other public agencies across the region.	<b>Fiscal year 2017/2018</b>
Jurisdictional, business and community partners have limited opportunities to work collaboratively to advance equity by sharing best practices, tools for evaluation and other resources.	Use existing committees and additional new opportunities to convene and work collaboratively with regional partners to advance equity related to: <ul style="list-style-type: none"> <li>• public engagement</li> <li>• stable and affordable housing</li> <li>• welcoming and inclusive parks and venues</li> <li>• accessible, safe and affordable transportation</li> <li>• equitable practices in the solid waste system</li> <li>• economic opportunity for communities of color through local government contracts and projects</li> </ul>	<b>After 2017/2018 fiscal year</b>



**Objective 2:** Provide technical support to regional jurisdictions to advance equity efforts.

CHALLENGE	ACTION	START YEAR
Jurisdictional, business and community partners have limited resources to conduct technical analyses to advance equity.	<p>Use existing committees and additional new opportunities to convene and work collaboratively with regional partners to advance equity related to:</p> <ul style="list-style-type: none"> <li>• public engagement</li> <li>• stable and affordable housing</li> <li>• welcoming and inclusive parks and venues</li> <li>• accessible, safe and affordable transportation</li> <li>• equitable practices in the solid waste system</li> <li>• economic opportunity for communities of color through local government contracts and projects.</li> </ul>	<b>After 2017/2018 fiscal year</b>

**Objective 3:** Produce and provide research and information to support regional jurisdictions in advancing equity efforts.

CHALLENGES	ACTION	START YEAR
Jurisdictional, business and community partners have limited resources to conduct research to advance equity.	<p>Use existing committees and additional new opportunities to convene and work collaboratively with regional partners to advance equity related to:</p> <ul style="list-style-type: none"> <li>• public engagement</li> <li>• stable and affordable housing</li> <li>• welcoming and inclusive parks and venues</li> <li>• accessible, safe and affordable transportation</li> <li>• equitable practices in the solid waste system</li> <li>• economic opportunity for communities of color through local government contracts and projects.</li> <li>• developing common language and understanding of racial equity.</li> </ul>	<b>After 2017/2018 fiscal year</b>

**Objective 4:** Work with regional partners to increase the utilization of local minority, women, and emerging small businesses and the number of skilled construction tradespeople of color.

CHALLENGE	ACTION	START YEAR
There is insufficient data on regional conditions regarding the racial demographic makeup of the construction trades workforce.	Conduct a market study to better understand the current composition of the construction trades workforce.	<b>Fiscal year 2016/2017</b>
There is no coordinated regional effort to create a pipeline to increase the number of skilled construction tradespeople of color.	<p>Convene regional partners to discuss solutions to increase the number of skilled construction tradespeople of color available to work on large projects. This would include the following topics:</p> <ul style="list-style-type: none"> <li>• enhancing apprenticeships</li> <li>• identifying technical and resources needs</li> <li>• continuing to invest in and convene the Workforce Diversity Summit</li> </ul>	<b>Fiscal year 2017/2018</b>
Local MWESB firms are persistently underutilized in governmental contracts throughout the region.	Convene regional partners to discuss solutions to increase the participation of local minority, women and emerging small businesses (MWESB) in government contracts (e.g. create joint workshop to advance COBID certification of these firms).	<b>After 2017/2018 fiscal year</b>

**QUICK GLOSSARY**

**COBID certified firms:**  
 State of Oregon’s  
 Certification Office of  
 Business Inclusion and  
 Diversity (COBID).





## Goal B

Metro meaningfully engages communities of color

### GOAL STATEMENT

Community relationships based on trust, policies that strengthen community involvement and community oversight of implementation ensure that communities of color are meaningfully engaged and influence Metro decisions and programs that impact their lives. Metro commits to co-creating with the community, learning from their collective wisdom and building the capacity of community leaders.





## Goal B - Metro meaningfully engages communities of color

### What does this goal mean for the community?

Metro will create policies, build systems and invest resources to break down social, historical and institutional barriers and positively transform how communities of color meaningfully engage in Metro decisions and the design of policies, programs and plans. The community will have greater ability to influence decisions, access and build relationships with decision makers and staff, and help develop and participate in meaningful public meetings and other inclusive engagement efforts. Metro will work to reduce barriers to attending public meetings, such as the time and location of meetings, provision of childcare and language services and the financial cost for communities to participate. In partnership with communities, Metro will establish and continue to refine culturally informed practices to ensure respectful and effective engagement of the Portland region's diverse communities. Additionally, Metro will strengthen and build lasting relationships and partnerships in order to foster greater understanding and capacity building in the community and internally. Metro will also work with the community to develop evaluation practices that increase public accountability.

### What does this goal mean for Metro staff and leaders?

Earning community trust and establishing strong community relationships will be a priority for all Metro staff and leaders. Staff will benefit from greater access to community expertise and increased buy-in from community members in the agency's decisions. Supported with the necessary resources, Metro staff will also work to ensure that engagement efforts with communities of color are coordinated and culturally informed, to provide meaningful opportunities to influence decisions and designs. Also, inclusive engagement efforts will place importance on building relationships through meaningful, one-on-one or small-group dialogue sessions with community. Metro staff will be responsible for reporting how community feedback was used and its impact on decision-making. Metro will adopt a standard practice of partnering with community to co-design engagement and evaluation measures for Metro policies, practices and plans.

## INCREASING YOUTH INVOLVEMENT IN METRO DECISION-MAKING

How can youth get more involved in the region's future?

That's the question Metro and The Momentum Alliance worked to address in their discussions to advance Metro's Strategic Plan to Advance Diversity, Equity and Inclusion and Community Relations.

The Momentum Alliance mentors and empowers youth from historically underrepresented communities to become social justice leaders through the Student Alliance Project and Leveraging Momentum. Momentum Alliance youth discussed the issues and inequities they face and their vision for the region.

Through their discussions, the Momentum Alliance worked to prioritize 13 action items that

can make the region work better for all of its residents. That list includes improved interaction and accountability on working with communities of color, increased diversity in hiring, increased awareness in communities of color and increased diversity in contracting.

Participants felt strongly that one of the most effective ways to diversify staff and leadership, especially positions that have real decision-making power, positions that are not entry-level, is to ensure that the hiring committee has many people of color with diverse experiences: not just people of color who have college degrees but also people of color who have diverse life experiences, not just people of color who have successfully assimilated to dominant culture.



## Goal B - Objectives and actions

### Objective 1: Establish and strengthen relationships with communities of color.

CHALLENGE	ACTION	START YEAR
Metro needs more consistent investment in community leadership development.	Develop and apply criteria to consistently partner and invest in existing community leadership programs that have greatest benefit to community. Criteria will include considerations for new partnerships.	Fiscal year 2017/2018
Engagement is often transactional instead of long-term and culturally appropriate.	Work with communities to co-create community-specific public engagement plans that work to develop long-term community relationships, as opposed to episodic engagement.	Fiscal year 2016/2017
	Identify and propose ways to improve youth engagement and youth involvement in Metro decision-making.	Fiscal year 2017/2018
Communities are over-burdened by engagement processes.	Create a system to better coordinate engagement with communities of color across Metro departments. This system should include the maintaining of a record of community-based organizations' involvement with Metro to support relationship continuity.	Fiscal year 2016/2017





**Objective 2:** Increase accountability by ensuring community involvement in the evaluation and implementation efforts.

CHALLENGE	ACTION	START YEAR
Metro staff do not have enough resources to ensure that equity informs the development of programs, policies and plans.	Provide training and support to Metro departments on the Racial Equity Analysis and Decision-Support Tool (see page 56) to best meet specific departmental portfolio.	<b>Fiscal year 2017/2018</b>
	Utilize the racial equity analysis and decision support tool on four select four pilot projects representing each of Metro's four lines of business: garbage and recycling, land use and transportation, parks and nature, and venues.	<b>Fiscal year 2016/2017</b>
	With the direct support of the DEI program, expand the pilot for utilizing the racial equity analysis and decision support tool within the programs, services, plans, and policies of each department.	<b>Fiscal year 2017/2018</b>
Metro should be more accountable to the community on its agency-wide equity efforts.	Create a Metro Council-appointed body to provide community oversight on the implementation of the Strategic Plan.	<b>Fiscal year 2016/2017</b>
	DEI program creates, publishes and submits annual equity report to Council, for publication and broad distribution.	<b>Fiscal year 2017/2018</b>
	Develop equity performance measure to include within Metro's balanced scorecard.	<b>Fiscal year 2016/2017</b>
	Create mechanisms to involve the community in the implementation and evaluation of the Strategic Plan.	<b>Fiscal year 2016/2017</b>
Metro should be more accountable to the community related to department-specific equity efforts.	Create specific criteria for a new equity category to be included in quarterly management reports to identify and track equity actions and investments.	<b>After 2017/2018 fiscal year</b>



**Objective 3:** Increase participation of communities of color in Metro decision-making.

CHALLENGE	ACTION	START YEAR
Public engagement meetings may not be supportive or conducive to participation.	Identify barriers and propose solutions to increase participation of communities of color in Metro engagement opportunities. Such barriers may include: public meeting times, lack of food and childcare, and location of meetings.	<b>After 2017/2018 fiscal year</b>
Community members do not have enough direct interaction with decision-makers.	Identify and propose the creation of new opportunities within public engagement activities for emerging community leaders to work with decision makers to help drive plan, policy and program outcomes.	<b>Fiscal year 2017/2018</b>
	Identify and propose the creation of new opportunities within public engagement activities for decision-makers to receive direct community input and to meaningfully consider and discuss what they've heard.	<b>After 2017/2018 fiscal year</b>
	Create financially supported volunteer seats on advisory boards and committees for youth of color, community members, and community-based organization representatives.	<b>After 2017/2018 fiscal year</b>
Communities find it difficult to become aware of engagement opportunities.	Conduct user testing to inform improvements to the accessibility and usability of digital tools for communities of color to get involved – including employment, volunteer, contract, committee, and public engagement opportunities. Invest in outreach and promotion strategies to raise awareness of individual opportunities and online tools.	<b>After 2017/2018 fiscal year</b>
Metro needs a longstanding, direct investment to support community engagement.	Metro departments set aside resources for contracting and partnering with community-based organizations or community groups for engagement. Include results in quarterly management reports.	<b>Fiscal year 2017/2018</b>

## Goal C

Metro hires, trains and promotes a racially diverse workforce

### GOAL STATEMENT

Metro has an organizational culture that is welcoming and inclusive of all people of color. Through training and hiring practices that break down barriers for applicants of color, Metro achieves a racially diverse workforce with opportunities for advancement and strong retention and promotion rates for staff of color. All Metro staff receives the training and support necessary to become culturally proficient and equitably serve all residents of the Portland metropolitan region.



## Goal C - Metro hires, trains and promotes a racially diverse workforce

### HIRING FOR LOCAL COMMUNITIES

A unique Metro program has evolved over time to help economically disadvantaged and minority residents find jobs at some Metro venues.

Metro's First Opportunity Target Area program was created in response to criticism that not enough work to build the Oregon Convention Center went to people who lived near the convention center. The center was built in a historically black neighborhood.

The program was later expanded to include Metro's Portland Expo Center and the Portland's performing arts venues.

Over time, the areas near the convention center experienced a major demographic shift, losing more than half of their black population. In 2016, Metro expanded the program, changing the boundary and income requirements to reflect the region's new demographics and improve economic opportunity for residents.

### What does this goal mean for the community?

Metro will have an organizational culture that makes all staff feel welcome and included, with a workforce that reflects the racial diversity of the Portland region. This diversity will be visible throughout all positions and leadership levels at Metro. Such a workforce will bring new, innovative ideas to guide policy direction and advance racial equity and produce more informed equity champions within Metro. It will also strengthen Metro's ability to provide effective and appropriate services to all communities to ensure equitable and culturally informed access to Metro resources. This diverse workforce will strengthen community connection with Metro to increase involvement in and awareness of Metro's programs, services, destinations and decisions.

### What does this goal mean for Metro staff and leaders?

Metro's inclusive culture and hiring practices will result in diverse staff at all levels, an environment where diverse opinions are valued and increased connections with community. It will be a culture that actively encourages staff to take bold action to break down racial disparities, while members of management will be leading advocates for diversity, equity and inclusion. This culture will welcome and foster safe and authentic conversations around equity and staff will have the tools to more inclusively support communities and fellow staff members. Metro will continue to develop hiring policies and procedures to ensure staff diversity throughout all position levels and create opportunities for advancement through mentorship and training. Additionally, clear and intentional investments will be made in front-line, temporary, seasonal and part-time staff to advance their careers within Metro.





## CONNECTING DISADVANTAGED YOUTH WITH NATURE

Metro's Urban Nature Overnights program partners with agencies who serve low-income youth to offer third to fifth graders a chance to experience the natural world, develop an appreciation of public lands and learn about wildlife conservation and stewardship issues.

Many children spend little to no time in nature. Besides any health problems this creates, children who lack firsthand experiences in the natural world are ill prepared as adults to make decisions regarding the environment.

The zoo partners with the Bureau of Land Management, the U.S. Forest Service, and REI to bring the joys of overnight camping to kids who have not had access to outdoor experiences. At the zoo or in local nature parks, kids in grades three to five learn recreation skills and environmental concepts. By touching, hearing, smelling, seeing and even tasting, they discover why it's not only vital, but also fun to understand and respect urban and wild ecosystems.

Campers are taught by zoo UNO staff and Zoo Animal Presenters. Each fall, the zoo works with public and alternative schools and Portland-area social service agencies to recruit potential ZAPs – teenagers ages 15 to 17 who show an interest in working with kids and animals. Every year nearly 100 teens apply for 10 open positions. Current ZAPs interview potential ZAPs; the zoo seeks teens from diverse cultural and economic backgrounds for the program.

By their third year, ZAP participants head outdoors for fieldwork: collecting native seeds to be used at Metro natural areas and conducting animal and habitat surveys in natural areas and national forests.

During the school year, UNO offers 8-week after-school programs at agencies and some Portland schools to enhance lessons learned at UNO during the summer. The program gladly accepts students with disabilities or for whom English is a second language.

## Goal C - Objectives and actions

### Objective 1: Metro’s culture supports staff’s ability to advance regional equity.

CHALLENGE	ACTION	START YEAR
Metro staff have limited resources to participate in diversity, equity and inclusion work.	Determine diversity, equity and inclusion criteria so that they can be clearly incorporated as part of the performance management review (PACe) for all staff.	<b>After 2017/2018 fiscal year</b>
	Department leadership work with DEI program staff to determine how equity, diversity and inclusion can be addressed as part of work duties.	<b>Fiscal year 2017/2018</b>
Equity is not perceived by all employees to be a central priority at Metro.	Adopt policy that Metro management positions must attend required DEI related trainings.	<b>Fiscal year 2017/2018</b>
	Reassess Metro values to ensure diversity, equity and inclusion are equally recognized as guiding principles.	<b>After 2017/2018 fiscal year</b>
	Incorporate equity discussions into all Metro advisory committees to ensure that these bodies uphold the same commitment to equity.	<b>After 2017/2018 fiscal year</b>
Metro staff have limited opportunities to hold safe, honest and open conversations about equity.	Create opportunities for staff across the entire organizational structure to discuss how to improve the organizational equity structures at Metro.	<b>Fiscal year 2017/2018</b>
Metro leadership should provide more explicit and clear direction to advance equity.	Develop an internal and external communication strategy to convey Metro's leadership commitment to diversity, equity and inclusion.	<b>Fiscal year 2017/2018</b>
	Staff and management from every department are actively involved in the implementation of the strategic plan and DAP through a clear and representative process.	<b>Fiscal year 2016/2017</b>
Metro staff members do not have enough opportunities to collaborate.	Identify and propose new opportunities for staff across Metro to develop and deepen relationships in formal and informal settings.	<b>After 2017/2018 fiscal year</b>



**Objective 2:** Increase the skills of staff in advancing regional equity.

CHALLENGE	ACTION	START YEAR
Metro staff have limited understanding, skills and resources to advance equity in their work.	Provide mandatory tailored trainings for all staff on racial equity and how it can be applied in their specific job duties.	<b>Fiscal year 2016/2017</b>
Metro staff face barriers to accessing tailored trainings on how to advance equity in their work.	Identify and propose new ways to increase accessibility of DEI trainings for venue staff and temporary/seasonal/part-time/graveyard staff.	<b>After 2017/2018 fiscal year</b>
	Identify and propose a variety of new learning methods and trainings to reach all regular status staff.	<b>After 2017/2018 fiscal year</b>

**Objective 3:** Racial makeup of Metro staff at every level more closely resembles the demographics of the region.

CHALLENGE	ACTION	START YEAR
Metro hiring committees are not diverse enough.	Diversify hiring committees by department including considering gender, age and cultural group. Include community members where appropriate.	Fiscal year 2016/2017
	In conjunction with HR, provide mandatory unconscious bias training to hiring managers and hiring committees.	Fiscal year 2016/2017
Community members do not have enough opportunities to gain work experience at Metro.	Create agency-wide policies regarding intern diversity and compensation.	After 2017/2018 fiscal year
	Further the job market preparation of interns by providing skill building opportunities.	After 2017/2018 Fiscal Year
	Create plan to address space limitations for interns.	After 2017/2018 Fiscal Year
Metro needs partnerships with community-based organizations to advance Metro's diversity efforts.	Partner with and invest in local communities of color and CBOs to attract more diverse applicant pools.	After 2017/2018 Fiscal Year
	Hire additional HR recruitment staff to strengthen relationships with community-based organizations, increase recruitment efforts and improve First Opportunity Target Area (FOTA) hiring.	Fiscal Year 2016/2017
	Identify and propose ways to connect existing community leadership programs with career opportunities at Metro.	After 2017/2018 Fiscal Year
Unintentional barriers in the Metro application process limit applicant pool diversity.	Review and adjust recruitment processes and the criteria for job descriptions using accessible language so that more value is placed on applicant's skills and abilities beyond the purely technical.	Fiscal Year 2017/2018
	Expand hiring interview format options for increased cultural sensitivity (e.g. panel, 1-1).	After 2017/2018 Fiscal Year
	Identify and propose new opportunities for potential applicants to learn more about job positions.	After 2017/2018 Fiscal Year
Metro needs more ladders for staff advancement.	Develop a succession plan for all levels in organization.	After 2017/2018 Fiscal Year
	Create a pilot professional mentorship program to cultivate front-line staff of color for leadership positions.	After 2017/2018 Fiscal Year
	Create a pilot employee resource group for staff of color. Explore possibility to expand this format to other employee communities.	Fiscal Year 2016/2017
Metro hiring managers have limited understanding, skills and resources to advance equity through their hiring process.	Identify and propose ways to increase pathways for Metro staff to gain skills for career advancement.	After 2017/2018 Fiscal Year
	Provide support and training for hiring managers to assess job requirements, create accessible job announcements and understand the value of diverse hiring.	Fiscal Year 2017/2018
Metro job opportunities are not promoted through culturally specific strategies.	Communicate job announcements using culturally specific languages, channels and organizations (e.g. tribal newspapers and Russian radio stations).	After 2017/2018 Fiscal Year

## Goal D

Metro creates safe and welcoming services, programs and destinations

### GOAL STATEMENT

Communities of color are aware of and feel welcome to access Metro's diverse services, programs and destinations. Through better understanding of the needs of culturally specific communities and the impacts of its programs and services, Metro provides safe and welcoming environments and experiences that enrich the lives of community members.



## Goal D - Metro creates safe and welcoming services, programs and destinations

### What does this goal mean for the community?

Metro will partner with communities of color to positively change how the agency's programs and services match community needs. Communities of color will be better informed about the availability of Metro programs, services and venues through culturally appropriate communication channels and tools. Greater access to and information about Metro's services will result in more equitable outcomes for communities of color. Metro properties will welcome visitors with environments that support communities' activities and sense of place and safety.

### What does this goal mean for Metro staff and leaders?

Metro staff will work to ensure that diversity, equity and inclusion are foundational pieces that inform the provision of culturally appropriate services and programs. Metro will also strive to ensure that all its properties are welcoming to all communities by creating a culturally informed environment that is accessible and supports communities activities and sense of place and safety. Greater participation of communities of color in Metro's services will translate into stronger relationships and support for Metro's programs and initiatives. Each department and venue at Metro will develop its own equity action plan to best deliver its unique services and programs equitably to the community, based on the goals of this Strategic Plan.



## IMPROVING ACCESS TO METRO VENUES FOR COMMUNITIES OF COLOR

Metro is trying to make its visitor centers more accessible to communities of color.

In February, Arlene Schnitzer Concert Hall hosted Black Violin, a musical duo from Fort Lauderdale, Fla., that brings classical strings to life with a modern sound. The blend of hip-hop and classical music is unique, and unfamiliar to many.

“We take a hard hitting beat,” said band member “Wil B” Baptiste. “And we approach it in the way a rapper or singer would... and just make it beautiful.”

Baptiste said that as he and bandmate “Kev Marcus” Sylvester have grown and toured, breaking stereotypes has become Black Violin’s mission statement. The duo is focused, he said, on starting a movement.

Even the way they play their instruments is meant to challenge stereotypes. From plucking the strings like a guitar to making music club-goers could groove to, it’s not the standard style for a violin.

The title track of their new album, aptly called “Stereotypes,” reflects this. Within the track, multiple voices define the word as “an often unfair and untrue belief that many people have... [that] all people or things with a particular characteristic are the same.”

Bravo Youth Orchestras, a free afterschool music education program for students from Portland’s Rosa Parks and Cesar Chavez schools, invited the duo to play in Portland last year. Black Violin then returned an invitation for the students to join them on stage.

Baptiste said he hoped the experience would help the youth orchestra students become better performers, and that they would have fun.



**Objective 1:** Increase the number of individuals of color who access Metro services and facilities.

CHALLENGE	ACTION	START YEAR
Metro staff have limited awareness of resources to advance equity at facilities and through services.	Communicate available language resources and translation tools to staff and the public.	Fiscal year 2017/2018
Metro destinations should hold more diverse, cultural events for communities.	Identify and propose ways to increase community cultural events held at all Metro properties (e.g. Día de los Muertos).	After 2017/2018 fiscal year
	Provide increased access for youth of color to Metro venues, parks and programs.(Examples include providing culturally relevant art events for Title I schools at Portland’s, nature education for Title I schools at the Oregon Zoo, and access to natural areas and programs at Metro parks.)	Fiscal year 2016/2017
The community is insufficiently aware of Metro’s services, programs and destinations.	Identify and propose new opportunities for communities of color to learn about Metro programs and services.	After 2017/2018 fiscal year
Metro staff are insufficiently aware of the communities utilizing services, programs and destinations.	Use newly standardized demographic questions across the agency and establish methods for disaggregating results for agency-wide public engagement efforts.	Fiscal year 2016/2017







**Objective 2:** Metro’s properties are more welcoming and reflective of all cultures.

CHALLENGE	ACTION	START YEAR
Metro has not fully acknowledged community, historical and cultural significance of its destinations.	Recognize the connection of Metro destinations to specific communities of color and visibly acknowledge how these connections are foundational to guiding Metro’s work. (For example, many Metro parks and natural areas are significant for the local Native American community).	<b>After 2017/2018 fiscal year</b>
Metro facilities and destinations may not be welcoming to all.	Reassess the guidelines for availability and usage of Metro properties for community-based organizations, and create awareness of those guidelines among communities of color.	<b>After 2017/2018 fiscal year</b>



**Objective 3:** Increase the accessibility and relevance of Metro’s programs and services to communities of color.

CHALLENGE	ACTION	START YEAR
There is a lack of strategic equity direction in each of Metro’s departments.	Beginning with departments with equity plans under way and with support from DEI, pilot the development of department-specific plans of action to advance equity within programs, services, plans, and policies within 12 months of this plan’s adoption.	<b>Fiscal year 2016/2017</b>
	With the direct support of the DEI program, expand the pilot for developing a specific plan of action to advance equity within the programs, services, plans, and policies of each department within 12 months.	<b>Fiscal year 2017/2018</b>
Metro programs and services are not promoted through culturally specific strategies.	Communicate program and service announcements using culturally specific language and channels (e.g. tribal newspapers and Russian radio stations).	<b>Fiscal year 2017/2018</b>



## Goal E

Metro's resource allocation advances racial equity

### GOAL STATEMENT

Metro advances economic opportunities for communities of color through various avenues including equitable contracting practices, distribution of investments, and grant programs.



## Goal E - Metro's resource allocation advances racial equity

### What does this goal mean for the community?

Metro will create and implement policies and procedures to ensure that its resources and investments advance racial equity. Metro will develop and apply an equity decision-making tool to its allocation of resources, both human and financial, to ensure more equitable investment in communities of color. By addressing barriers in its contracting processes, Metro will support and facilitate applications for its contracts by COBID-certified firms, community-based groups and nonprofit organizations. As mentioned in Goal A, Metro will play a leadership role in strengthening cross-regional partnerships to expand the number of minority-owned and women-owned small businesses in the Portland region, as well as skilled professionals of color in the construction trades.

### What does this goal mean for Metro staff and leaders?

Increased racial equity in Metro's resource allocation will lead to stronger community relationships and greater support for the agency's programs and initiatives. Metro staff will receive support in using an equity decision-making tool to assess and allocate resource investments in programs and services, including grants. Staff will continue to assess and strengthen contracting processes to ensure the removal of barriers and increased support for COBID-certified firms, community-based groups and nonprofit organizations. And as indicated in Goal A, Metro will assume a leadership role in strengthening cross-regional partnerships to expand the number of minority-owned and women-owned small businesses in the Portland region, as well as skilled professionals of color in the construction trades.





## INVESTING IN ORGANIZATIONS FROM COMMUNITIES OF COLOR

Metro has a long history of building partnerships with local community organizations. However, Metro recognizes that communities of color traditionally have been under-represented both as grant recipients and project participants.

In one project, Self Enhancement, Inc. teamed up with Metro to develop nature curriculum for at-risk urban youth, from the classroom to Metro parks and natural areas. Near Forest Park, high school students worked with a Metro scientist to make the habitat healthier by creating pollinator-friendly plantings. The ultimate goal: helping young people feel welcome in nature today and explore environmentally focused careers for the future.

Partners in Nature was created in collaboration with organizations representing communities of color. Leaders identified a common goal of connecting their constituents to the land, accessing Metro-managed parks and natural areas, and working with Metro's Parks and Nature team.

Students were not the only ones transformed by the experience. Metro and SEI staff developed a close relationship based on a mutual understanding of each organization's mission and how these fit together to serve diverse and underserved communities.

"People came with open hands and open hearts, and that's why it worked," said Gerald Deloney, SEI's director of program advancement.

The collaboration with SEI is one of several Partners in Nature projects that Metro has developed to engage underserved communities. The initiative was made possible by a 2013 levy that the region's voters approved to care for protected land and connect people with nature.

**Objective 1:** Increase the utilization of equity criteria in resource allocation .

CHALLENGE	ACTION	START YEAR
Metro does not have an equity lens that can be applied to Metro resource allocation.	Develop and implement a budget tool to assist in making resource allocation decisions, including discretionary budget allocation, investments, contracts, grants, and sponsorships using a racial equity lens.	<b>After 2017/2018 fiscal year</b>
	Develop and implement agency-wide equity criteria for grants, investments and sponsorships to increase impact and investment consistency.	<b>Fiscal year 2017/2018</b>
There are not enough simple and easy ways for communities to become aware of financial opportunities (e.g. grants and contracts).	Conduct user testing to improve access to and awareness of digital tools to communicate all financial opportunities at Metro to communities of color (e.g. a page on Metro’s website, a weekly email message to interested parties).	<b>After 2017/2018 fiscal year</b>

**QUICK GLOSSARY**

**COBID certified firms:**  
State of Oregon’s  
Certification Office of  
Business Inclusion and  
Diversity (COBID).



## Objective 2: Advance social equity contracting at Metro.

CHALLENGE	ACTION	START YEAR
There is a lack of data on regional conditions regarding social contracting needs.	Research and choose method to identify the contracting needs for firms in the region. These preparations include the identification of financial resources and coordination with jurisdictional partners, the Metro Attorney and procurement office.	Fiscal year 2017/2018
Barriers in Metro contracting processes prevent COBID-certified firms and community partners from realizing contracting opportunities.	Continue to invest in the social equity contracting program that focuses on the removal of barriers and the creation of accessible contracting opportunities for vulnerable business communities.	Fiscal year 2016/2017
	Create an equity tool to legally determine waivers for contract requirements, such as insurance.	After 2017/2018 fiscal year
	Involve the COBID contractors in the development of RFPs and grants to increase accessibility as long as they do not bid.	After 2017/2018 fiscal year
Diversity, equity and inclusion are not consistently central priorities for Metro contracts.	Create policy to support the inclusion of diversity, equity and inclusion metrics into contract proposal evaluation.	Fiscal year 2017/2018
	Require project managers to attend procurement training on developing requests for proposals (RFPs).	Fiscal year 2017/2018
	If applicable, establish a process that requires an explanation as to why a COBID contractor was not utilized.	After 2017/2018 fiscal year
Limited community relationships prevent knowledge of and willingness of communities to promote contract opportunities at Metro.	Increase intentional outreach to communities and community-based organizations regarding contracting opportunities, working through business partners.	After 2017/2018 fiscal year
	Increase Metro staff participation in professional networking opportunities for communities of color.	After 2017/2018 fiscal year
Potential contractors have limited opportunities to learn how to strengthen their firm and become COBID certified.	Continue to invest in providing regular and geographically and culturally accessible trainings that assist companies to become certified as COBID and help COBID vendors apply for RFPs.	Fiscal year 2016/2017



## PARTNERING TO INCREASE THE NUMBER OF TRADESWOMEN OF COLOR

How can more women and minorities get into contracting?

To talk about that, Metro hosted a screening of the film “Sista in the Brotherhood,” in April and had a panel discussion to talk more about the challenges and opportunities in contracting for women and people of color.

Fewer than three percent of contractors are women, said panelist Roberta Hunte, a Portland State University professor who co-produced the film.

In Oregon, that number is closer to seven percent, but Metro and other groups are working to increase it further.

Local tradespeople are also working to increase those numbers, including a program through the Pacific Northwest Regional Council of Carpenters called Sisters in the Brotherhood.

Metro procurement manager Gabriele Schuster said that the first step is “understanding what the needs are, because understanding that will help us form the policies.” To do that, she said, it takes getting out and talking to the people living those realities, and participating in events such as the screening.

Schuster also said that local governments need to collaborate with each other and with contractors and subcontractors to form partnerships and create a pipeline.





## How will Metro achieve these goals?

### The Strategy

Metro will utilize several interlocking approaches that will lead to long-term institutional and structural change:

- **Leading with race:** Focusing on eliminating the disparities that people of color experience in all aspects of social well-being, especially in those related to Metro’s policies, programs, services and destinations.
- **Targeted universalism:** Addressing the disparities that affect the most disadvantaged will generate solutions to address most of the needs of other vulnerable groups.
- **Building infrastructure:** Creating the frame and space for Metro councilors, directors, staff and other stakeholders to advance the conversation about race, enact changes at the institutional level and organize for structural change.

### METRO EQUITY STRATEGY GOALS

**Goal A** - Metro convenes and supports regional partners to advance racial equity

**Goal B** - Metro meaningfully engages communities of color

**Goal C** - Metro hires, trains and promotes a racially diverse workforce

**Goal D** - Metro creates safe and welcoming services, programs and destinations

**Goal E** - Metro's resource allocation advances racial equity

- **Generating support:** Working with internal stakeholders and regional partners to promote an equity approach that creates institutional and structural change.
- **Partnering with communities of color:** Ensuring that members of these communities are involved in Metro’s equity efforts to create greater trust and accountability.
- **Measuring progress:** Measuring and recognizing milestones and significant developments, to increase and maintain momentum along the route to greater racial equity and change.

## Racial equity

This Strategic Plan envisions a Portland metropolitan region where conditions enable all individuals and communities to participate and prosper. To get to this destination, Metro will use a strategy founded on racial equity.

A racial equity strategy focuses on “closing the gaps” so that race does not predict one’s success. To do so, Metro has to target strategies to focus improvements for some of the most disadvantaged, moving beyond services to work on changing policies, institutions and structures.

To this end, this Strategic Plan intentionally focuses on the barriers that affect people of color. People of color share similar barriers with other historically marginalized groups such as people

with low income, people with disabilities, LGBTQ communities, older adults and young people. **By addressing the barriers experienced by people of color in the Portland metropolitan region, we will effectively also identify solutions and remove barriers for other disadvantaged groups. The result will be that all people in the region will experience better outcomes.**

Many people of color are also members of other historically marginalized communities, so they experience the intersection of two or more identities. Even within these communities, people of color tend to experience the worst outcomes in measures of social well-being. Metro recognizes the need to consider and address the barriers that affect all historically marginalized communities, but the

### NO NEED TO CHOOSE BETWEEN EQUITY AND ECONOMIC GROWTH

The Portland region’s population is growing and changing. People of color have the highest rates of population growth.

Additionally, economists and researchers continue to illustrate that equity and economic growth are complementary. Regions with greater racial inclusion and smaller racial income gaps are more primed for economic growth.<sup>3</sup> Research also points out that:

- The public sector plays an important role in enhancing local economy.
- Deconcentrating poverty has positive impacts on the regional economy.
- Large immigrant populations enhance economic growth.
- An influential minority middle class can help regions combine the interest in prosperity with a commitment to fairness.
- Efforts to create shared social norms through ongoing dialogue are crucial for the vibrancy and vitality of regions.<sup>4</sup>

Equity and community diversity are positive influential factors and therefore have become a greatly effective economic growth model for regions across the country.<sup>5</sup>

For these reasons Metro will use a racial equity approach and apply racial equity decision-making tools and evaluation metrics to the objectives, action items and outcomes in this plan. By addressing barriers and evaluating outcomes for communities of color, Metro intends to improve outcomes for all underserved or marginalized communities.

3 Treuhaft, S., Blackwell, A.G., & Pastor, M. (2012). America’s Tomorrow: Equity is the Superior Growth Model. Retrieved: [http://www.policylink.org/sites/default/files/SUMMIT\\_FRAMING\\_WEB\\_20120110.PDF](http://www.policylink.org/sites/default/files/SUMMIT_FRAMING_WEB_20120110.PDF)

4 Benner, C. & Pastor, M. (2015). Equity, growth, and community: What the nation can learn from America’s Metro areas. Oakland, CA. University of California Press.

5 See Treuhaft, S., Blackwell, A.G., & Pastor, M. (2012), Benner, C. & Pastor, M. (2015) above.

agency is making the conscious decision to start with the barriers that affect people of color.

Metro will continue to remove barriers for all disadvantaged groups through the implementation of its Diversity Action Plan, which was approved by the Metro Council in 2012.

The solutions identified through this Strategic Plan will strengthen Metro's ability to serve and benefit all people in the region. For example, when the Metro Council "banned the box" that asked employment applicants to

disclose prior criminal convictions on job applications, it eliminated a barrier that disproportionately affects people of color, who are incarcerated at much higher rates than whites.<sup>6</sup> But this action also benefits people with prior convictions from all communities, who often struggle to find employment.

Another possible action calls for reducing barriers for communities of color to participate in Metro meetings and events – things like time, location, availability of child care, transit access and so on. Addressing

these barriers will improve the ability of other community members to attend as well. Similarly, creating inclusive and welcoming environments will ensure that all people will feel comfortable accessing all Metro venues and facilities, whether for entertainment or educational purposes, to seek services or to participate in the agency's decision-making process.

6 Curry-Stevens, A., Cross-Hemmer, A., & Coalition of Communities of Color (2010) Communities of Color in Multnomah County: an Unsettling Profile. [www.coalitioncommunitiescolor.org/cccdatabasearch](http://www.coalitioncommunitiescolor.org/cccdatabasearch)

### Racial and ethnic composition of the Portland metropolitan region

As the Portland metropolitan region's population continues to grow and change, its future success depends on the success of everyone. Unfortunately, avoidable inequities rooted in historical burdens continue to prevent communities of color from realizing their full potential and limits the region's progress.

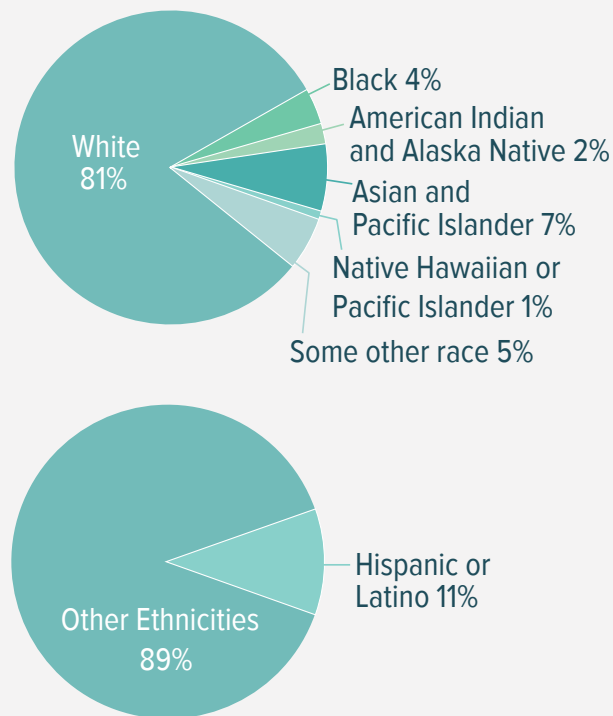


Chart 4 data: Portland metropolitan region 2010 U.S. Census and 2009-2013 ACS 5-year

## Implementing and evaluating the Strategic Plan

Metro's ability to successfully complete the actions outlined in this Strategic Plan and evaluate progress toward its goals will rely heavily on the strength of its implementation and evaluation process.

This section outlines the implementation structure and the evaluation approach to ensure that this Strategic Plan can efficiently, effectively and collaboratively improve equity in the region, and that its results can be measured.

### Four-step implementation process

The structure for implementation has four steps: Plan, Act, Check and Adjust. Managed by Metro's Diversity, Equity and Inclusion program, each step will work together to ensure that six components are infused into the process:

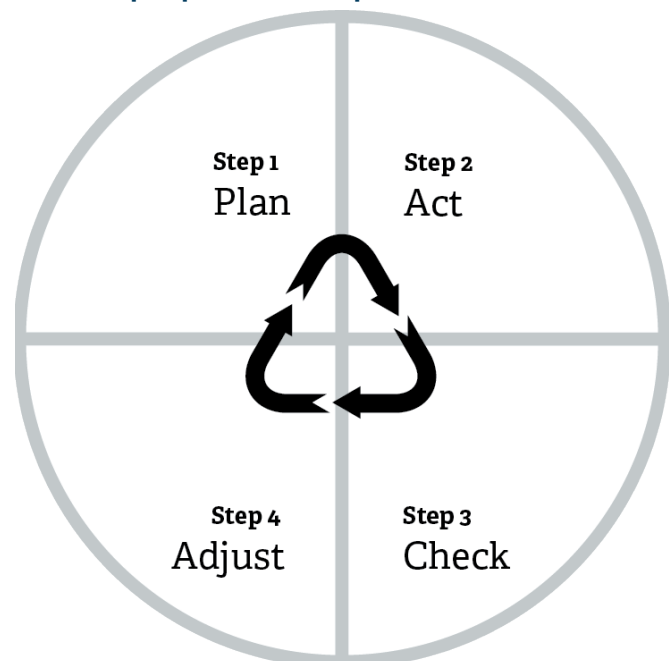
- Set and evaluate success indicators, progress measures and behavior impacts.
- Meaningfully involve a diverse array of Metro staff and community members.
- Dedicate sufficient resources for efficient and effective action completion.
- Provide sufficient level of authority to implementation teams to complete action.
- Establish accountability through community participation.
- Create a model for continuous learning and improvement

### QUICK GLOSSARY

#### Sponsor:

In project management terminology, the Sponsor is responsible for the project's success and provides oversight, is a decision-maker, and removes barriers. The Sponsor approves expenditures and project change requests, and reviews the appropriate documentation.

### Four-step implementation process overview



### Step 1 - Plan

The DEI Steering Committee, which includes a diverse set of Metro's senior management, will first prioritize, sponsor and assign actions identified in this Strategic Plan.

The DEI Steering Committee will identify an appropriate action team to move forward with each action's completion, based on what is required to complete it (e.g. authority, financial requirements and staff support). The DEI Steering Committee will select from a set of already established teams that range from the Diversity Action Plan teams to DEI Program staff.

The steering committee will also assign each action a senior management sponsor. This sponsor is responsible for supporting the action team and will be held accountable for the completion of the action.

### Step 2 - Act

Step 2 is the implementation stage. During this step, each action team will develop a work plan based on a template form. The work plan will detail how the action will be achieved and measured to determine its success.

Once the work plan is completed and approved by the team's sponsor, the team will move forward to take the action.

The workplan template will also assist the team in assessing the potential impact of the action, to determine whether it will likely reduce barriers for all marginalized communities.

These communities may include but are not limited to other ethnicities, women, adult learners, veterans, people with disabilities, lesbian, gay, bisexual, and transgender individuals, different religious groups and different economic backgrounds.

This assessment helps ensure that actions for the racial equity approach benefit all marginalized communities.

### Step 3 - Check

Step 3 is the evaluation stage. This step will involve the Strategic Plan Evaluation Team. Comprised of diverse representatives from the community, Metro staff and Metro leadership, who bring expertise in each of the five Strategic Plan goals. Guided by a professional evaluator, the team will be responsible for conducting a participatory impact evaluation of the Strategic Plan goals, objectives and actions.

The Strategic Plan Evaluation Team and evaluation process is described beginning on page 55.

### Step 4 - Adjust

The fourth step is the continual improvement stage. After completing the evaluation, the team will create an evaluation report with findings and recommendations.

Recommendations could include new proposed actions or adjustments for improvement. If the team determines that new actions are needed, they will be responsible for researching and identifying potential solutions.

The evaluation report will be sent to the DEI Steering Committee, which will restart the process at Step 1.



## Evaluation Process

Evaluation is a very important aspect of the Strategic Plan because it ensures transparency, accountability, measured progress and continual improvement.

Metro will use a quantitative and qualitative approach with a focus on **participatory impact evaluation**. This approach brings together community members and multiple levels of Metro staff and uses a broad range of evaluation tools to holistically examine the impact of Metro's work.

### Components of the four-step implementation process

#### STEP 1: PLAN

##### DEI STEERING COMMITTEE

- Reviews and refines action recommendations.
- Sets equity actions and determines budget.
- Identifies team to implement action.
- Sets senior management level sponsor for actions.



#### STEP 2: ACT

##### IMPLEMENTATION TEAMS

- Example implementation Teams: Diversity Action Plan teams, DEI Steering Committee and DEI program staff.
- Completion of template work plan to establish implementation approach and evaluation measures.
  - Assessment of whether action will benefit all marginalized communities.



#### STEP 4: ADJUST

##### STRATEGIC PLAN EVALUATION TEAM

- Assesses evaluation findings.
- Creates recommendations for improvement, including the proposal of new actions.
- Develops an evaluation report presenting findings and recommendations.



#### STEP 3: CHECK

##### STRATEGIC PLAN EVALUATION TEAM

- Guided by a professional evaluator.
- Evaluate each goal, objective and action using participatory impact approach.

This participatory impact evaluation approach will be further refined as the goals and objectives are implemented and require evaluation. It will focus on three levels of evaluation: goal, objective and action.

### Goal and Objective Evaluation

The goal level focuses on agency-wide and regional transformation. At this level, the Strategic Plan Evaluation Team will analyze each of the five Strategic Plan goals to determine how success will transform Metro and the region. The team will then establish success indicators to evaluate Metro's progress.

Similarly, at the objective level of evaluation, the Strategic Plan Evaluation Team will analyze the objectives nested under this Strategic Plan's goals to determine what success will look for each objective. The Strategic Plan Evaluation Team will then establish indicators to evaluate Metro's progress toward this success.

### Success Indicators

The Strategic Plan Evaluation Team will be created shortly after the adoption of this Strategic Plan. This team will be guided by a professional evaluator and include diverse representatives from the community. The team will be responsible for developing success indicators for the Strategic Plan goals and objectives. This work will take place simultaneously with the implementation of the first year's action items. The evaluation targets developed by this team will also inform future Strategic Plan actions and Metro departments as they develop their own specific equity plans.

Once success indicators have been established for each of the goals and objectives, DEI Program staff will begin to collect the necessary data for future evaluation. The Strategic Plan Evaluation Team will regularly reconvene to evaluate progress.

### Action Evaluation

At this level, action teams will establish measures to evaluate the implementation and impact of each

action in this Strategic Plan. These measures will be developed in step 2 of the implementation process described on page 53.

Each action team will use a template to design a work plan to achieve its action. The template will also help the team establish measures to evaluate successful completion and impact of their action.

After these measures have been established, DEI Program staff will collect and compile the appropriate data. Once enough data has been compiled, the work plan will be sent to the Strategic Plan Evaluation Team. The evaluation team will then be responsible for evaluating whether the action was successfully completed and had the desired effect.

## PARTICIPATORY IMPACT EVALUATION

Participatory impact evaluation is an approach that involves stakeholders in the evaluation process. This involvement can take place during any stage of the evaluation including data collection and reporting.

Research shows that this participatory approach has several benefits:<sup>8,9</sup>

- Increases community accountability.
- Provides opportunity for leadership development and skill building for staff and community.
- Builds better data.
- Enhances understanding of the data and findings.
- Strengthens recommendations.

Metro will use this approach by involving Metro staff and community stakeholders at each stage of the evaluation process.

8 Guijt, I. (2014). Participatory Approaches, Methodological Briefs: Impact Evaluation 5, UNICEF Office of Research, Florence.

9 Zukoski, A. and M. Luluquisen (2002). "Participatory Evaluation: What is it? Why do it? What are the challenges?" Policy & Practice(5). [http://depts.washington.edu/ccph/pdf\\_files/Evaluation.pdf](http://depts.washington.edu/ccph/pdf_files/Evaluation.pdf)

## Racial equity analysis and decision-support tool

A racial equity analysis and decision-support tool is an important component of this Strategic Plan. This tool will help Metro proactively filter out unconscious bias and institutional racism, and counteract policies and practices that inadvertently maintain inequity.

Government agencies working to advance racial equity use evaluation tools customized to meet their specific goals and needs. These are often called "equity lenses". In some large agencies, such as the City of Seattle and the City of Portland, specific departments or programs have customized the equity lens for their own specific purposes.

A successful racial equity analysis and decision-support tool is used within the context of a larger racial equity strategy. Employees are trained on the appropriate way to use the tool. Facilitators are available to help them use the tool and engage in intentional dialogue on racial equity. Facilitators also help staff incorporate findings made through using the tool into the agency's policies, procedures, services and decisions to ensure that the needs of historically underserved populations are fully vetted and considered throughout the planning and implementation phases.

The communities most impacted by the policies, procedures, services and decisions being analyzed must also be engaged in the application of the tool.

Used without the required training, facilitation and community engagement, however, the tool could become a simplistic exercise of answering a set of formulaic questions without the proper support to implement ideas and innovations that may come to light.

In general, a successful racial equity analysis and decision-support tool must:

1. Promote a racially inclusive collaborative process.
2. Use data to set and monitor goals to achieve equity, and promote accountability and transparency.
3. Integrate program and policy strategies to implement actions that improve equity.
4. Partner across sectors and institutions to create lasting change.
5. Educate and communicate about racial equity to continuously raise racial equity awareness.

### COMPONENTS OF AN EFFECTIVE RACIAL EQUITY TOOL

According to the Resource Guide for Advancing Racial Equity & Transforming Government<sup>10</sup>, there are four major components of an effective racial equity tool:

- It proactively seeks to eliminate inequities and advance equity.
- It has identified clear goals, objectives and measurable outcomes.

- It poses questions about who would benefit or be burdened by a given decision, the potential unintended consequences of the decision, and who has been involved with developing the proposal and will be involved with implementation.
- It develops mechanisms for successful implementation

<sup>10</sup> Government Alliance on Race and Equity. (2015) Advancing Racial Equity and Transforming Government: A resource guide to put ideas into action.



Metro's racial equity analysis and decision-support tool will include training and support for staff to successfully use the tool, a questionnaire to guide equity's incorporation into the agency's activities, and community engagement to ensure that the people most affected by the agency's activities have the opportunity to shape those activities. Training on the appropriate use of the racial equity analysis and decision-support tool will be included as part of the diversity, equity and inclusion curriculum created by DEI Program staff.

DEI Program staff have developed a draft 13-point questionnaire to guide the analysis of existing policies, procedures, programs and services to determine how well they advance or hinder the practice of racial equity at Metro. This questionnaire will be customized during the implementation phase of this Strategic Plan by individual departments, divisions, programs and venues to meet their specific needs. The questionnaire will also help them develop and implement their own action plans. The questionnaire can be found in Appendix H.

The questionnaire will also serve as the basis for a budget decision-making tool that incorporates racial equity into Metro's resource allocation decisions. This budget tool will affect discretionary budget allocation,

investment, contracts, grants and sponsorships.

Following the adoption of the Strategic Plan, Metro staff leadership will select four pilot projects to utilize the racial equity analysis and decision support tool, from inception to completion. The selected projects will represent each of Metro's four main lines of business: garbage and recycling, land use and transportation, parks and nature, and venues. DEI Program staff will work with the designated project managers and other participating staff to calibrate and customize the tool for its successful application. DEI Program staff will also create opportunities for participating project staff to share the knowledge and lessons learned acquired during the pilot use of the tool, especially regarding how to best customize it for specific departments and venues.

The pilot application of the racial equity analysis and decision-support tool will last one year. During this time, DEI Program and project staff will create draft criteria for when Metro policies, procedures, projects, programs, services, investments, decisions will be required to use the racial equity analysis and decision support tool.

The consistent application and refinement of this tool will reinforce Metro's commitment to being a learning organization where continuous improvement and innovation are valued and practiced.

## QUICK GLOSSARY

**Unconscious Bias:** Unconscious attitudes and stereotypes toward individuals and social groups that affect our understanding, actions, and decisions.

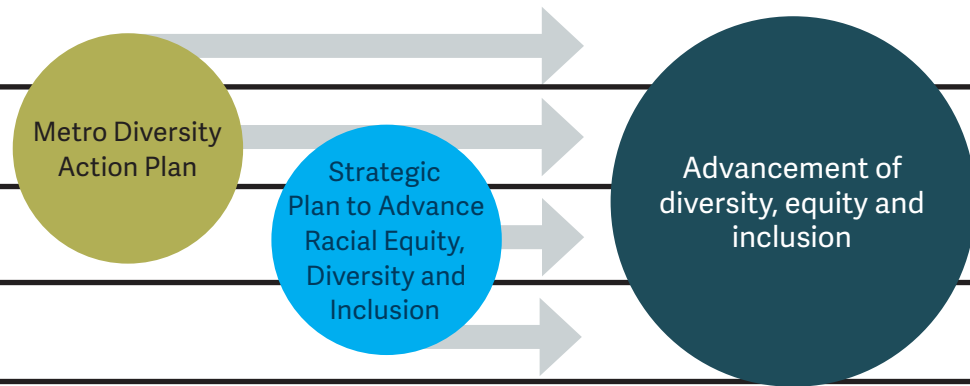
## FORMS OF RACISM

### INDIVIDUAL

### INTERPERSONAL

### INSTITUTIONAL

### STRUCTURAL



### FOUR FORMS OF RACISM:

#### 1. Individual Racism:

Individual Racism Pre-judgment, bias, or discrimination based on race by an individual.

#### 2. Interpersonal Racism:

Interpersonal racism occurs between individuals. Once we bring our private beliefs into our interaction with others, racism is now in the interpersonal realm.

#### 3. Institutional Racism:

Policies, practices, and procedures that work better for white people than for people of color, often unintentionally.

#### 4. Structural Racism:

A history and current reality of institutional racism across all institutions, combining to create a system that negatively impacts communities of color.

### Diversity Action Plan integration

The Metro Council adopted Metro's Diversity Action Plan in 2012. The plan identifies and implements strategies and actions to increase diversity and cultural competence at Metro in four key areas: internal awareness and diversity sensitivity, employee recruitment and retention, public involvement and citizen advisory committee membership, and procurement.

Metro recognized the interconnectedness of equity, diversity and inclusion, so it brought these three functions together to create the Diversity, Equity and Inclusion Program (DEI) in September 2014. For DEI, equity is the "Why", diversity is the "Who", and inclusion is the "How" it should do its work.

The Diversity Action Plan focuses primarily on addressing issues at the interpersonal level, while also confronting some issues at the individual and institutional levels. On the other hand, Metro's approaches to advancing equity and inclusion largely focus on issues related to institutional and structural racism, while also addressing some areas of interpersonal racism.

The overlap between the Diversity Action Plan and this Strategic Plan falls within the interpersonal and institutional levels. Artificially separating these two plans could create a troubling disconnect between them, potentially leading to agency-wide inconsistencies in approaches, unnecessary redundancy or competition of resources and staff time. However, the definition of diversity in the Diversity Action Plan is much broader than just racial diversity. Taking a racial equity approach in this Strategic Plan while also ensuring diversity and inclusion efforts target all marginalized groups will take some time to sort out. To ensure successful outcomes and a thoughtful process, DEI staff recommends developing an approach to ensure effective implementation of both the Diversity Action Plan and this Strategic Plan within one year of this plan's adoption.

In integrating the two efforts together, the Diversity Action Plan can incorporate content from this Strategic Plan. This would allow for the quicker implementation of the actions recommended in this plan, some of which may have fallen outside the scope of the Diversity Action Plan.



## *What information is guiding this strategy?*

This section describes each aspect of Metro's multi-pronged inclusive engagement and research effort to inform the direction of this Strategic Plan. DEI Program staff created various points of input to collect diverse feedback from community members and staff to ensure the development of a strategic direction that will provide Metro with the greatest opportunity to reach its equity goals and vision.

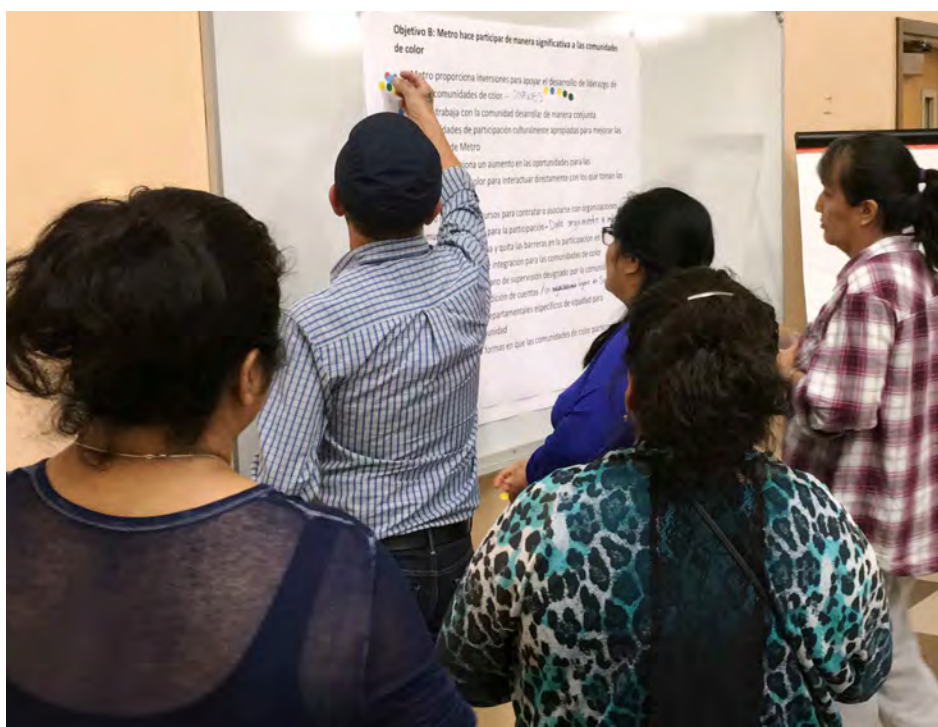
### **Community Engagement**

Beginning in spring 2015, DEI Program staff sought the advice of local elected officials, government staff and business and philanthropy leaders throughout the Portland region. Metro councilors and staff held more than 50 meetings in a three-month period, with three objectives:

1. Inform key regional stakeholders of the development of the Strategic Plan.
2. Elicit feedback into critical regional equity issues and potential roles for Metro to help advance equity throughout the Portland metropolitan region.
3. Cultivate regional partners to work with Metro on the implementation of the Strategic Plan.

Additionally, Metro partnered with a local community-based consulting firm, MultiCultural Collaborative, to help organize, recruit, facilitate, record and summarize comments from 18 discussion groups with communities of color, youth and experts in the fields of transportation, parks and housing. These discussions were led by culturally-specific community-based organizations. In all, more than 250 people participated in these discussion groups, divided into two rounds of nine sessions each in June and October 2015, .

The first round of discussion groups, held in June 2015, focused on gathering input on potential programs, policies and initiatives that Metro could implement to increase equity, and to address regional or community-specific disparities, barriers and opportunities to increase long-term, meaningful engagement with Metro. These discussions created approximately 140 ideas related to strategies and actions that Metro could pursue (Appendix B).



In October 2015, Metro staff, community-based organizations and MultiCultural Collaborative held a second round of discussions with the same nine groups that participated in the first round. The objectives of these follow-up discussions were:

1. Ensure that Metro correctly captured the comments, feedback and insight of each stakeholder group.

2. Identify any new ideas that may have not been collected during the first round of discussions.
3. Enlist community insight into prioritizing the ideas captured during the first discussion groups.

The second round of discussions uncovered several new actions and strategies, and consistent

priorities across the groups (Appendix C). The identified actions, strategies and suggested priorities were foundational to the development of this Strategic Plan and will continue to help inform Metro's equity actions.



## COMMUNITY DISCUSSIONS - SPRING 2016

### Major themes

These conversations varied in language and in process, but overall a few major themes emerged:

1. Develop a common language and understanding of racial equity in the community.
2. Invest in existing leadership development programs to grow future leaders of color.
3. Provide paid internship or career development programs for youth of color.
4. Continue to hire and support staff that reflects the demographic make-up of the region.

Each facilitator or organization submitted summary reports that captured the key themes heard during the discussion as well as key questions participants asked. Metro also requested the reports capture priority actions recommended by participants. Summary reports were shared with decision-makers at Metro and can be found in Appendix D.

Following the release of the draft Strategic Plan on February 23, 2016, Metro staff conducted public engagement activities from mid-February through April 2016 to ensure that a diverse and representative group of stakeholders across the region could weigh in and provide input to shape the final version of the Strategic Plan. The objectives of these public engagement activities in 2016 were:

1. Build awareness of the Strategic Plan and gain support from key stakeholders and members of the public as well as Metro staff.
2. Build trust and sustained relationships with organizations that serve communities of color.
3. Solicit input to help strengthen the draft Strategic Plan to reflect community needs and priorities.

Metro councilors, managers and staff, in partnership with community-based organizations and consultants, used several mechanisms to achieve the goals of these engagement activities. The mechanisms included one-on-one meetings with stakeholders from across the region; presentations to multi-jurisdictional committees; an online survey in five languages (English, Spanish, Russian, Vietnamese and Chinese) widely publicized through the Opt In panel, coordinated email outreach, social media and a Metro news story; participation in related events; presentations and discussions with staff teams from all Metro departments and venues; and nine community discussion groups led by facilitators from community-based organizations and consulting firms.

The online survey contained three questions to help Metro prioritize, measure and further advance equity. The survey received 1,194 responses. Most indicated support for Metro to address racial equity, and prioritized increased collaboration with communities of color,



achieving a more racially diverse workforce, and providing more investment opportunities to support small businesses owned by and community organizations that serve people of color. The complete report of the online survey results can be found in Appendix E.

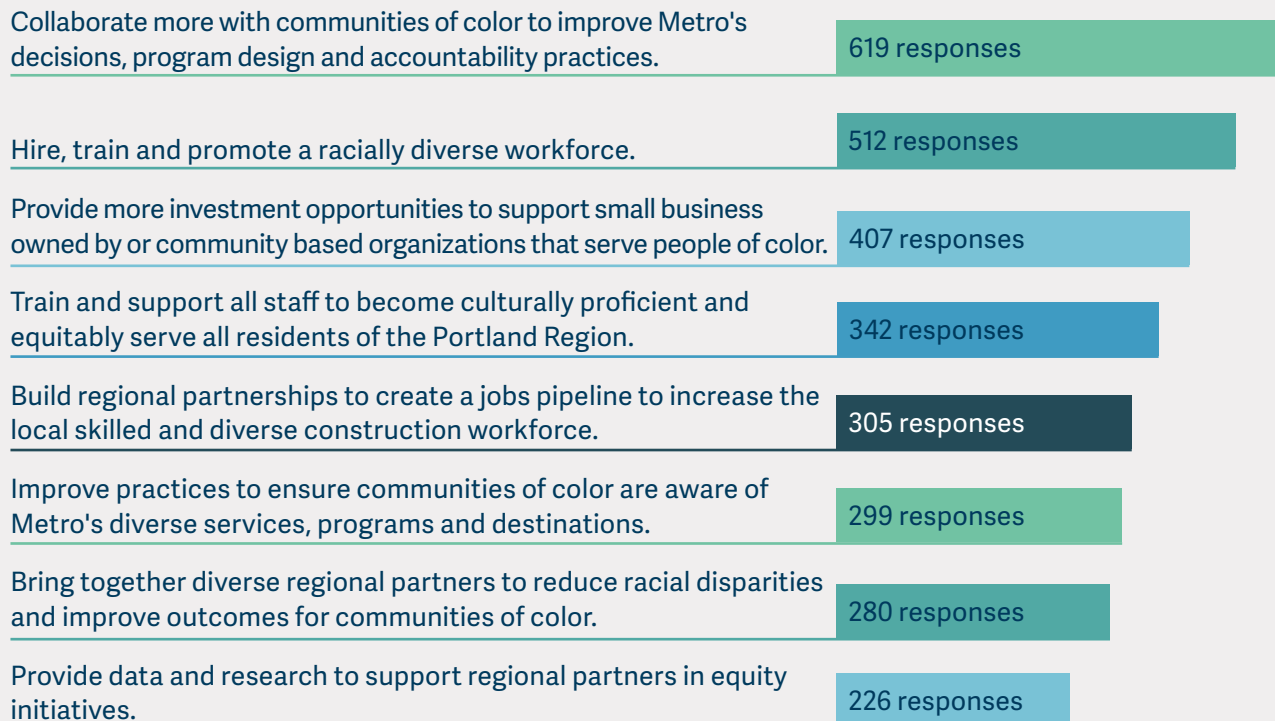
More than 140 members of communities of color and immigrants participated in the nine discussion groups organized and facilitated by community-based organizations and consultants. A translated Strategic Plan Executive Summary and other materials were used to facilitate four discussion groups in languages other than English. This effort to reach out to and solicit input from people of color and immigrants was important to achieve greater demographic and geographic balance among the people who provided input on the draft Strategic Plan. In general, participants in the nine discussion groups were also positive about the goals, objectives and actions included in the draft Strategic Plan, though they also identified ideas for additional actions.

The information collected through these 2016 public engagement activities confirmed general support for the goals, objectives and actions included in this Strategic Plan. It also helped Metro leadership and staff establish priorities for action implementation and refine the evaluation approach included in the final version of this Strategic Plan. A full report on engagement activities in 2016 can be found in Appendix D.

Throughout this entire process, members of the Equity Strategy Advisory Committee provided an additional community perspective and contributed to improving the content of the Strategic Plan with their comments and suggestions.

## SURVEY FINDINGS SNAPSHOT

### Question: What should Metro prioritize in order to advance equity?

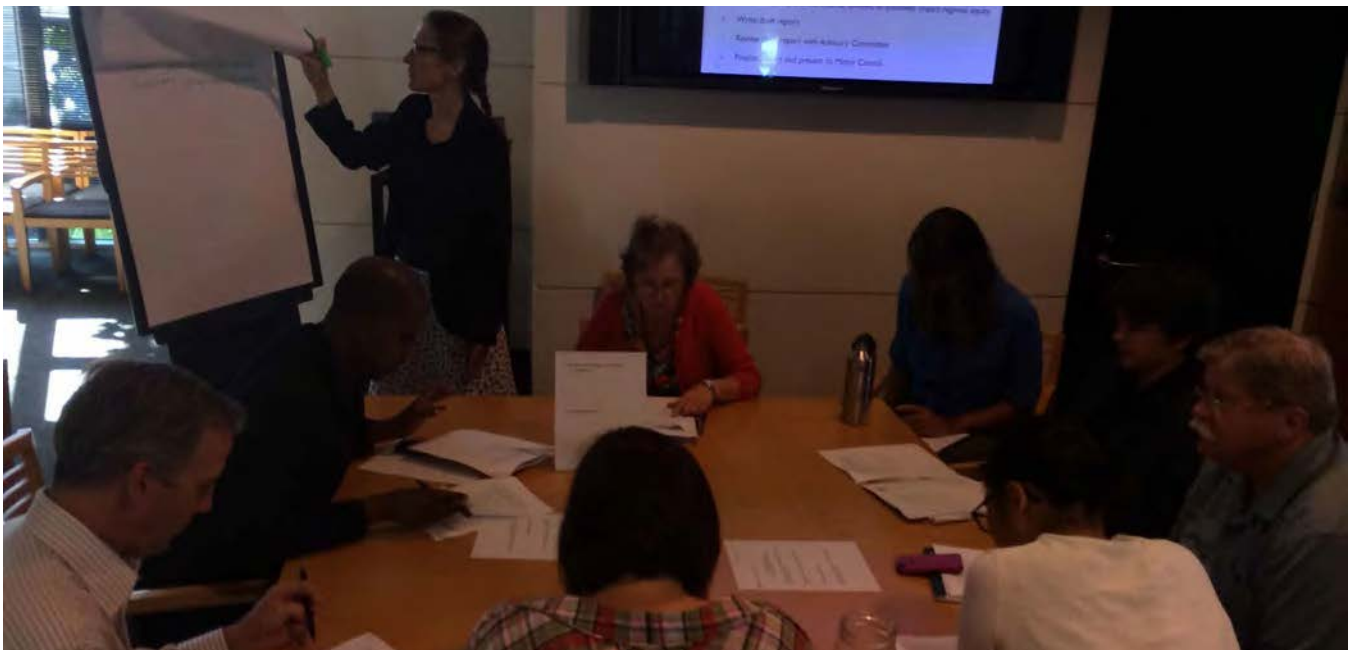


## Metro staff engagement

Building off the recommendation from the Equity Framework Report, Metro also engaged in a community-led internal equity assessment. Continuing its collaboration with the six community-based organizations that comprised the Equity Baseline Workgroup, Metro contracted with them to design and facilitate a three-month internal staff engagement effort to better understand Metro's roles and responsibilities to advance equity in the Portland metropolitan region and the authority it has to impact existing disparities.

Collaborating with representatives from the Equity Strategy Advisory Committee (ESAC), the community-based organizations created a four-step staff engagement process to achieve the desired outcomes of the internal assessment:

- **Step 1: Preparation survey** — Each staff participant completed a survey that assessed their current level of awareness and understanding of the term “equity” and provided initial opportunities to share insight related to Metro’s role and authority to advance equity in the Portland region.
- **Step 2: Kick-off meetings** — Each participant attended a kick-off meeting that provided standard baseline information, definitions, and context related to the Strategic Plan. These meetings’ purpose was to ensure that each participant felt prepared for subsequent equity discussions.
- **Step 3: Small group engagement sessions** — Over a two-month period, 10 small group meetings were held to gather ideas, insights, suggestions and direction on how Metro could address current equity issues or expand its equity efforts. Each small group meeting was facilitated by two representatives of community-based organizations or ESAC and involved five to 14 staff members representing various departments and programs throughout Metro.
- **Step 4: Optional closing survey** — To provide additional opportunities for staff to share suggestions or insight, each participant received an optional survey at the end of each small group discussion.





More than 80 staff members from every Metro department and division participated in this internal engagement effort. The consistent themes elicited from the small group discussions and surveys were compiled and used to inform the direction of this Strategic Plan (Appendix F).

Following the release of the draft Strategic Plan in February 2016, DEI Program staff conducted presentations to staff teams in every Metro department and venue. These presentations were intended to continue to inform staff about the racial equity approach and the goals included in the Strategic Plan and to help them identify how the proposed strategy relates to their specific job duties. The presentations sparked dialogue that helped department and venue leadership and staff start thinking about the development of their specific equity action plans.



## SIX DESIRED REGIONAL OUTCOMES

To guide its decision-making, the Metro Council, on the advice of the Metro Policy Advisory Committee (MPAC), adopted six desired outcomes as characteristics of a successful region:

- People live, work and play in vibrant communities where their everyday needs are easily accessible.
- Current and future residents benefit from the region's sustained economic competitiveness and prosperity.
- People have safe and reliable transportation choices that enhance their quality of life.
- The region is a leader in minimizing contributions to global warming.
- Current and future generations enjoy clean air, clean water and healthy ecosystems.
- The benefits and burdens of growth and change are distributed equitably.

## Organizational Self-Assessment Related to Racial Equity

Upon recommendation from the Equity Strategy Advisory Committee, DEI Program staff decided to use the Tool for Organizational Self-Assessment Related to Racial Equity as a crucial input to inform this Strategic Plan. Developed by local organizations Coalition of Communities of Color and All Hands Raised, the tool is designed to gather a holistic snapshot of an organization's practices and policies as they relate to racial equity.

In summer 2015, DEI staff assembled a workgroup of 15 staff members representing different Metro departments and venues to answer questions posed in the tool, identify gaps and make recommendations.

This workgroup met in September and October 2015 and jointly answered questions to assess racial equity in three major organizational categories:

1. Organizational commitments, which includes the areas of leadership and governance; racial equity policies and implementation practices; workforce composition and quality; and resource allocation and contracting practices.
2. Customer and client service, which includes the areas of service-based equity, service-user voice and influence; and data metrics.
3. Community interface, which includes the areas of organizational climate, culture and communications; community collaboration; and continuous quality improvement.



DEI Program staff also engaged with additional Metro staff of color, who discussed the following questions from the self-assessment tool:

- Do the organization's senior leaders act consistently around racial equity, for example by allocating sufficient resources for equity initiatives, making racial justice a standing agenda item at key meetings, and ensuring people of color are decision-makers?
- Does your organization encourage or support difficult conversations about race in a safe, confidential, private space?
- Describe your organization's primary physical space and what it may communicate to diverse stakeholders. Is it welcoming and accessible? Consider the use of height, open spaces, natural or artificial light, art, signage and visual representations and facilities such as gender neutral bathrooms and lactation rooms.
- Describe whether, and how, the Metro Regional Center's entrance area is welcoming and supportive of diverse individuals and families. For example, is there comfortable seating and supports for those with children?
- Please provide a couple of examples of how your organizational meetings that involve the public are conducted in a manner that supports equity and inclusion, and values diverse ways of speaking, thinking, debating, reflecting and making decisions.
- Are racial equity and cultural competency training and capacity-building made available to your workforce?
- The overall analysis and the resulting report identified progress and gaps (Appendix G). The recommended actions to fill these gaps have also helped guide this Strategic Plan.



## METRO PLAN AND INITIATIVES

### The following Metro plans, programs and initiatives inform the Strategic Plan to Advance Racial Equity, Diversity and Inclusion:

- Affirmative Action Plan (2015)
- Diversity Action Plan (2012)
- Environmental Literacy Framework (2016)
- Equitable Housing Initiative (2016)
- Limited English Proficiency Plan (2015)
- Oregon Innovation Award (2016)
- Parks System Plan (2016)
- Public Engagement Guide (2015)
- Regional Transportation Plan (2014)
- Six Desired Outcomes (2010)
- Title VI Plan (2012)
- Youth Engagement Strategy (2015)

## Agency-wide plans and initiatives

Over the past decade, many Metro divisions and programs have prioritized diversity, equity or inclusion efforts. Much of this work has been successful and, in some cases, has guided the practices of other government agencies throughout the country. A major intent of this Strategic Plan is to build off past success and provide a space to highlight the full extent of the diversity, equity and inclusion work already taking place within the agency.

To ensure that this strategy is guided by past efforts and accounts for ongoing ones, DEI Program staff worked to identify past, current and future work related to diversity, equity and inclusion by hosting more than a

dozen meetings and discussions with various department staff and leadership throughout the agency.

Once these past and ongoing efforts were identified, DEI Program staff used them to guide and frame the direction of this Strategic Plan. Additionally, the recommendations and actions from these efforts are incorporated into the objectives and actions outlined on pages 19 to 47.



# Glossary



**Color-blind** - The racial ideology that posits the best way to end discrimination is by treating individuals as equally as possible, without regard to race, culture or ethnicity. It focuses on commonalities between people, such as their shared humanity.

– Wise, T. J. (2010). *Colorblind: the rise of post-racial politics and the retreat from racial equity*. San Francisco, CA: City Lights Books.

**Community** - All individuals who live, work, play or pray in the Portland metropolitan region.

**Communities of Color** - For the purposes of this plan, communities of color are Native Americans, African Americans, Asian Americans and Pacific Islanders, Latinos or Hispanics, and immigrants and refugees who do not speak English well, including African immigrants, Slavic and Russian speaking communities, and people from the Middle East.

**Cultural proficiency** - A comprehensive collection of behavior, attitudes, practices and policies that creates an inclusive environment for people of diverse backgrounds. Culturally proficient organizations have the awareness, knowledge base and learned skills to effectively and sensitively work with and provide services to people of diverse backgrounds.

– Metro (2012). *Diversity Action Plan*.

**Culture** - A social system of meaning and custom that is developed by a group of people to assure its adaptation and survival. These groups are distinguished by a set of unspoken rules that shape values, beliefs, habits, patterns of thinking, behaviors and styles of communication.

– Maguire, John, Sally Leiderman, and John Egerton (2000). *A Community Builder's Tool Kit – 15 Tools for Creating Healthy, Productive, Interracial/Multicultural Communities*. Claremont, CA: The Institute for Democratic Renewal and The Project Change Anti-Racism Initiative.

**Diversity** - The variance or difference amongst people. This variance includes race, ethnicity, gender, age, religion nationality, language preference, socioeconomic status, disability, sexual orientation, gender identity and others. These differences are tied to a variety of other aspects of diversity such as experience, work styles, life experience, education, beliefs and ideas. Honoring these differences while upholding our value for respect is central to our diversity philosophy.

– Metro (2012). *Diversity Action Plan*.

**Equity** - Metro's working definition of equity reads: "Our region is stronger when all individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment and sustainable resources that enhance our quality of life."

We share a responsibility as individuals within a community and communities within a region. Our future depends on the success of all, but avoidable inequities in the utilization of resources and opportunities prevent us from realizing our full potential.

Our region's population is growing and changing. Metro is committed with its programs, policies and services to create conditions which allow everyone to participate and enjoy the benefits of making this a great place today and for generations to come."

– Metro's Equity Strategy Advisory Committee (2014).

**Historically marginalized** - A limited term that refers to groups who have been denied access and/or suffered past institutional discrimination in the United States and, according to the Census and other federal measuring tools, includes African Americans, Asian Americans, Hispanics or Chicanos/Latinos and Native Americans. This is revealed by an imbalance in the representation of different groups in common pursuits such as education, jobs, housing, etc., resulting in marginalization for some groups and individuals and not for others, relative to the number of individuals who are members of the population involved.

Other groups in the United States have been marginalized and are currently underrepresented. These groups may include but are not limited to other ethnicities, adult learners, veterans, people with disabilities, lesbian, gay, bisexual, and transgender individuals, different religious groups and different economic backgrounds.

– University of California, Berkeley (2015). Berkeley Diversity – Glossary of Terms.

**Inclusion** - Inclusion refers to the degree to which diverse individuals are able to participate fully in the decision-making process within an organization or group. While a truly "inclusive" group is necessarily diverse, a "diverse" group may or may not be "inclusive."

– Metro (2012). Diversity Action Plan

**Individual racism** - Racism Pre-judgment, bias, or discrimination based on race by an individual.

– Government Alliance on Race and Equity (2015) Advancing racial equity and transforming government: A resource guide to put ideas into action. [http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource\\_Guide.pdf](http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource_Guide.pdf)

**Institutional racism** - Policies, practices, and procedures that work better for white people than for people of color, often unintentionally.

– Government Alliance on Race and Equity (2015) Advancing racial equity and transforming government: A resource guide to put ideas into action. [http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource\\_Guide.pdf](http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource_Guide.pdf)

**Interpersonal racism** - Interpersonal racism occurs between individuals. Once we bring our private beliefs into our interaction with others, racism is now in the interpersonal realm.

– Tools and Concepts for Strengthening Racial Equity, Presentation to School District U-46 Terry Keleher, Applied Research Center, 2011.

**Race** - A social construct that artificially divides people into distinct groups based on characteristics such as physical appearance (particularly color), ancestral heritage, cultural affiliation, cultural history, ethnic classification, and the social, economic and political needs of a society at a given period of time. Racial categories subsume ethnic groups.

– Maurianne Adams, Lee Anne Bell and Pat Griffin, editors. *Teaching for Diversity and Social Justice: A Sourcebook*. New York: Routledge..

**Racial equity** - Race can no longer be used to predict life outcomes and outcomes for all groups are improved.

– Government Alliance on Race and Equity (2015) *Advancing racial equity and transforming government: A resource guide to put ideas into action*. [http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource\\_Guide.pdf](http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource_Guide.pdf)

**Racism** - Conduct, words, practices or policies which advantage or disadvantage people based on their culture, ethnic origin or color. Racism is just as damaging in obvious forms as it is in less obvious and subtle forms, and is still called racism whether intentional or unintentional.

– Lopes, T. & Thomas, B. (2006). *Dancing on Live Embers: Challenging Racism in Organizations*. Between the Lines: Toronto, Ontario.

**Sponsor** - In project management terminology, the Sponsor is responsible for the project's success and provides oversight, is a decision-maker, and removes barriers. The Sponsor approves expenditures and project change requests, and reviews the appropriate documentation.

– Metro (2013). *Construction Project Management Guide*. Retrieved May 2016.

**Social equity contracting** – Removing barriers and creating accessible contracting opportunities for vulnerable business communities.

**Structural racism** - A history and current reality of institutional racism across all institutions, combining to create a system that negatively impacts communities of color.

– Government Alliance on Race and Equity (2015) *Advancing racial equity and transforming government: A resource guide to put ideas into action*. [http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource\\_Guide.pdf](http://racialequityalliance.org/newsite/wp-content/uploads/2015/02/GARE-Resource_Guide.pdf)

**Targeted Universalism** - Targeted universalism alters the usual approach of universal strategies to achieve universal goals, and instead suggests **we use targeted strategies to reach universal goals**. For example, targeted strategies in hiring for people of color would look at access. If communities of color don't have better access to hiring announcements (e.g. by eliminating lack of awareness of job opportunities, unnecessary job requirements and inaccessible language), then the creation of a new job opportunity will not help much.

– Adapted from Perrius, C. (2011). *Targeted Universalism*. National Equity Project.

**Unconscious bias (or implicit bias)** - Unconscious attitudes and stereotypes toward individuals and social groups that affect our understanding, actions and decisions.

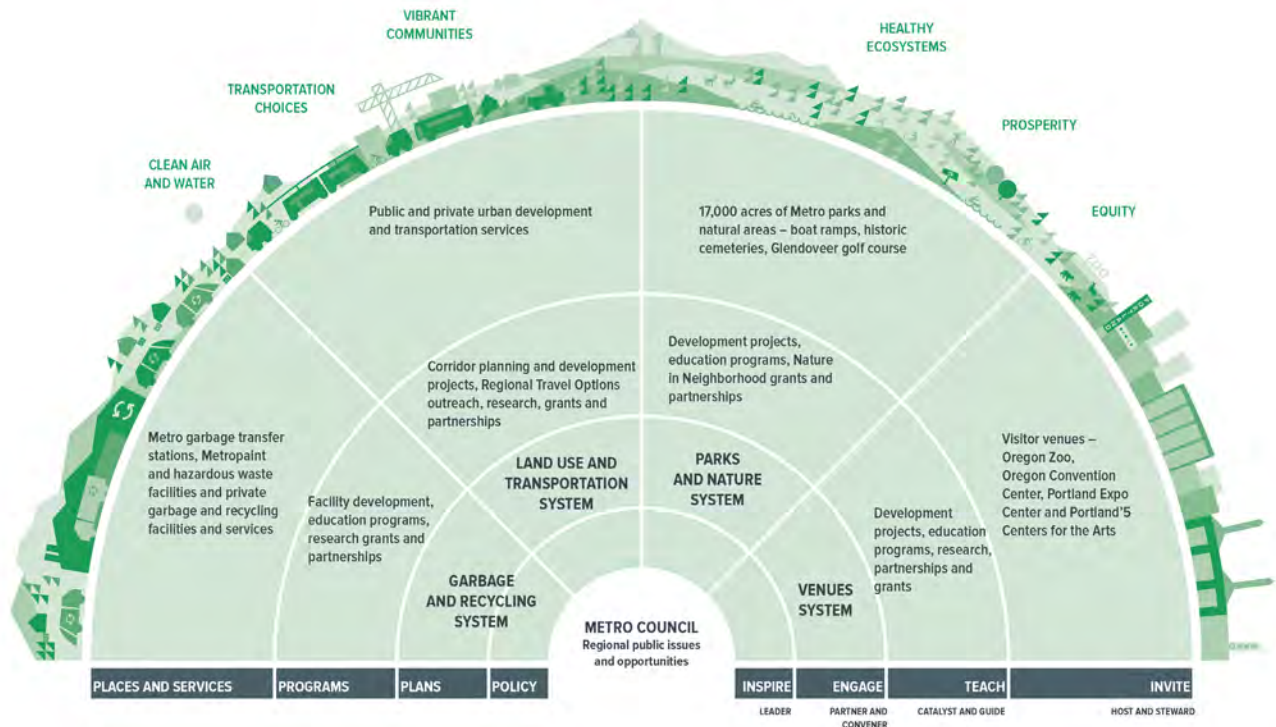
– Adapted from the Center for Social Inclusion (2015). *Talking about Race Toolkit*.

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# How Metro works

## Making a great place



## Appendix A - background of Metro's commitment to advance equity

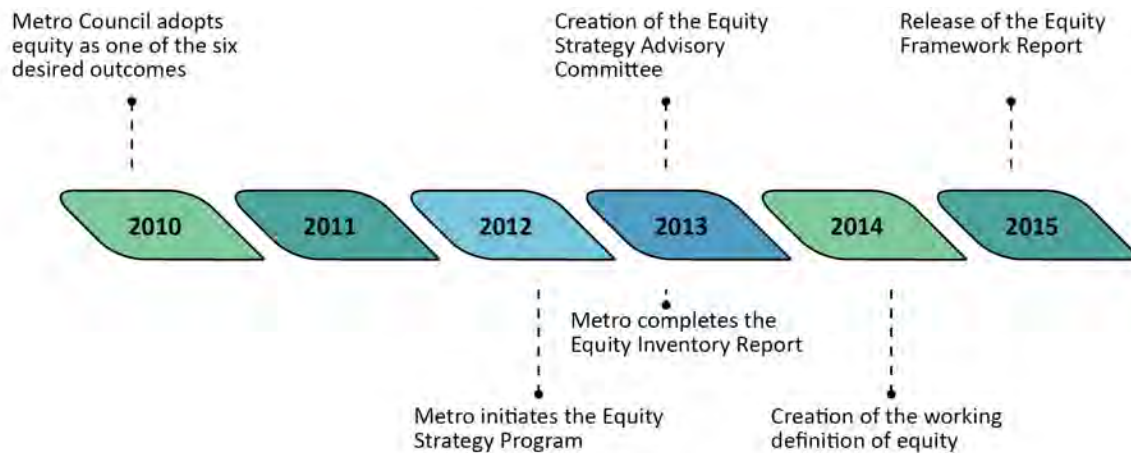
Metro is the regional government for the Portland metropolitan region. The agency's 1,600 employees work in performance venues, cemeteries, classrooms, natural areas and parks, an exhibition hall, a convention center, administrative offices, recycling and garbage transfer stations, a paint remanufacturing plant and the Oregon Zoo.

Metro is governed by the Metro Council, a nonpartisan group of seven elected representatives who work together with 25 cities, three counties and numerous community leaders and constituents on long-range plans and programs that cross city and county boundaries to create a vibrant Portland region.

Metro has four major lines of business where the agency has influence to impact the quality of life

for the residents of the Portland metropolitan region: Garbage and Recycling, Land Use and Transportation, Parks and Nature, and Venues. The policies, plans, programs and services that stem from these four business lines provide an immense opportunity for Metro to advance equity through its own direct authority or by acting as a regional convener.

Metro staff and leadership acknowledge that in spite of our region's world-renowned reputation for smart growth, sustainability, transportation choices, natural beauty and economic vitality, some communities are being left behind – and have been for many years. To address these persistent disparities, Metro is committed to action.



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

In 2012, Metro initiated the Equity Strategy Program, with the objective of creating an organizing framework to help Metro consistently incorporate equity into policy and decision-making. The most significant program accomplishments to date include:

- the completion of the Equity Inventory Report, which catalogued the existing equity-related activities throughout Metro’s departments

- the creation of the Equity Strategy Advisory Committee, a group of external stakeholders who provide input to the Metro chief operating officer and staff regarding the implementation of the equity strategy
- the investment and creation of the Diversity, Equity and Inclusion Program, which demonstrates Metro’s priority to advance diversity, equity and inclusion and establishes a formal group to strategically coordinate and guide such efforts within Metro
- the release of the Equity Framework Report, commissioned by Metro and prepared by six community-based organizations.

### A working definition of equity

In 2014, ESAC created a working definition of equity that continues to guide Metro in its strategic effort to advance equity throughout the region.

Metro’s working definition of equity reads:

Our region is stronger when all individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment, and sustainable resources that enhance our quality of life.

We share a responsibility as individuals within a community and communities within a region. Our future depends on the success of all, but avoidable inequities in the utilization of resources and opportunities prevent us from realizing our full potential.

Our region’s population is growing and changing. Metro is committed with its programs, policies and services to create conditions which allow everyone to participate and enjoy the benefits of making this a great place today and for generations to come.

## Equity Baseline Workgroup and Equity Framework Report

Completed in January 2015, the Equity Framework Report was a community-led report resulting from a yearlong collaborative effort conducted by six local community-based organizations: 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. These organizations, collectively known as the Equity Baseline Workgroup, were selected competitively to work under contract with Metro staff to identify, inventory, classify and recommend quantitative and qualitative evidence-based indicators and corresponding data sets that measure the varying degrees by which people experience equity and inequity in our region.

The Equity Baseline Workgroup initially determined that the development of evidence-based indicators and data that could assist in measuring regional equity was a premature step in the creation of Metro’s Strategic Plan. The workgroup stressed that an effective strategic direction first required a keen understanding of the historical and current community needs that Metro seeks to address. From such a foundation, Metro can better track future trends and assess the

impact of its public policy work. The workgroup also highlighted the importance of an honest assessment of internal Metro policies, programs and services, and their corresponding investments and infrastructure practices that may either have helped advance or further hindered progress in achieving equitable outcomes. To objectively recognize these challenges, the workgroup said, it was important for Metro to engage diverse community members and their representatives as front-line “experts” to convey the lived experience of residents, interpret the most critical regional equity-related needs and formulate recommendations to inform the creation of a useful equity strategy.

With the support of Metro staff and the Equity Strategy Advisory Committee, the Equity Baseline Workgroup changed their product from baseline indicators and data to focus on creating a framework report to provide the necessary foundation of historical and community needs, as well as the structure to advance an assessment of internal policies, programs and services. The group’s work also included inventorying over 300 datasets and potential regional indicators of equity and identifying and defining 10 indicator categories, each with its own associated potential data points, and relating them to Metro’s level of authority and influence.



The Equity Baseline Workgroup presented three major recommendations within the Equity Framework Report:

1. Metro should use a racial and economic justice-based approach in its equity strategy in order to adequately take into account equity's social, political, environmental, and economic dimensions.
2. Metro should recognize that equity and the other five desired regional outcomes cannot be segregated from one another or discussed in isolation. Equity is unique among these desired outcomes because it is fully integrated into the other five. For Metro to meaningfully improve the other five outcomes at the regional level, it must improve equity. Likewise, in order to meaningfully improve equity, Metro must improve the other five outcomes. Therefore, the workgroup recommended that Metro reframe the six desired regional outcomes as the "Equity +5" desired regional outcomes.
3. Metro should utilize the established 10-indicator framework to complete a community-led internal equity assessment. This assessment would present the foundational information needed for Metro to more fully understand its roles and

responsibilities to advance equity in the region and the authority that it has to impact the disparities faced by the most vulnerable communities. For Metro to succeed in reaching its equity goals, Metro should commit to making internal and institutional changes that reduce these disparities, where Metro has the authority and influence to do so.

The Equity Framework Report and its recommendations were submitted to the Equity Strategy Advisory Committee for review and discussion.

### **Equity Strategy Advisory Committee guidance**

ESAC supported most of the recommendations presented in the Equity Framework Report, including the adoption of a racial and economic justice lens to guide Metro's work and the implementation of a collaborative community effort to do an in-depth assessment of Metro's policies, programs, services and authority. The committee developed and submitted a memorandum to Metro's chief operating officer with their formal recommendations.

Following the receipt of ESAC's memo, the chief operating officer approved an agency direction to advance the main conclusion of the Equity Framework Report: Build a strategy that advances equity at Metro in the short- and long-term and focuses on

improving outcomes for communities of color and low-income residents of the region.

### **Racial equity approach selection**

The DEI team selected the Center for Social Inclusion (CSI) as the consulting team to support the creation of this Strategic Plan. CSI staff have extensive experience working with local jurisdictions around the country in the development of equity strategies. Together with the Haas Institute at the University of California, Berkeley, CSI founded the Government Alliance on Race & Equity, a coalition of local government entities that work on advancing equity.

Part of CSI's scope of work was to research national best practices and examples of the implementation of equity by government entities. Research by the DEI team and CSI showed that most government entities working to advance equity in the United States are adopting the racial equity approach: focusing on removing barriers for people of color to achieve better outcomes, which in turn helps remove barriers for all other disadvantaged communities.

The DEI team presented these findings to the Metro Council in July 2015, and councilors agreed with the staff recommendation of using the racial equity approach as the foundation of this Strategic Plan.



## General observations

- For many participants, while they may have had equity discussions within their organizations, this was the first time they had the opportunity to discuss equity with Metro;
- Culturally specific discussion groups do not know very much about Metro's services, programs and roles in the regional policy;
- There is a wide variation in needs, priorities and how communities are talking and delivering services for equity, housing, transportation, parks and natural areas and community engagement.

## Recommendations

- Communities in the Metro region are talking about equity in many different ways and discussions with these groups should be tailored regionally and culturally.
- Metro may need to spend more time with certain communities than others to build relationship and trust to get authentic community engagement.
- Metro should continue to engage with these discussion groups so they can serve as ambassadors to their communities for Metro.

- Include a Metro transportation expert and/or TriMet staff at each meeting.
- Encourage Metro Council members to attend one or more discussion groups to listen to community issues and build relationships with their constituents.

To view the full report, visit the following website: <http://www.oregonmetro.gov/sites/default/files/RTP-2018-discussionGroupReport-20150805.pdf>





5. Housing, transportation, parks and natural areas need to be developed and managed to provide access to the communities that are most impacted historically by institutional racism.

Two subject matter expert discussion groups identified the following recommendations to Metro:

### Transportation

1. Metro has the opportunity to use the regional flexible funds to focus on transportation equity criteria. However, not all communities have focused on equity, so this should not be the only criterion for awarding funding.
2. Use TriMet's equity index for funding investments. Measure transportation

investments and measure outcomes for communities of color over time.

3. Metro and communities need to focus on "last mile" solutions. Light rail only provides service to a small percentage of the population. Public transit is hard to provide in lower density, suburban communities, however, there is a large need for transportation solutions in these "transit deserts".

### Housing

1. Clarify Metro's role in affordable housing. Some participants strongly urged Metro to take role of ensuring performance at the local level.
2. Be aware and responsive to how individual cities need to respond to local conditions.

3. Provide additional funding options for affordable housing.

### Parks and Natural Areas

1. Enable opportunities for parks and natural areas to partner with health care organizations to provide healthy experiences outdoors.
2. Provide regional grants to help support Culturally Based Organizations engage with parks and natural areas and hire more diverse park staffs that are bilingual.
3. Communities in the region vary quite a bit from very urban to rural open spaces. Metro should provide regional coordination for outreach and engagement with diverse communities.







## Next Steps

Metro will be finalizing their Strategic Plan to Advance Equity. The draft plan will be available for public comment before Metro will adopt the plan in mid-2016.

For future engagement activities, the following are key recommendations and best practices drawn from the cultural group discussions:

- Youth. Continue to engage with youth groups from Momentum Alliance, Organizing People/Activating Leaders (OPAL) and Asian Pacific American Network of Oregon (APANO) by attending meetings and events with these groups.
- Russian Slavic Community. If Metro is going to provide written handouts for community discussions, all materials need to be translated. Provide continuous engagement by using experienced Community Engagement Liaisons (CELs) as a bridge of trust or provide a Russian-speaking Metro representative at meetings.
- African Immigrant Community. Continuous interpersonal and organizational interconnection and communication between Community Based Organizations (CBOs) and Metro is important. Having an elected official come to the second meeting was important to this group.

- African American Community. Include participation by Metro's decision makers in community engagement discussion groups, including: Metro Council, Equity Strategy Advisory Committee (ESAC) and Metro Exposition and Recreation Commission (MERC).
- Native American Community. Provide more time at meetings to allow participants to process information, get in the flow and build a level of safety and trust to provide thorough feedback.
- Asian Pacific Islander Community. Continue engagement with CBOs. Participants feel invested in this process and want to see their input in Metro's written plan.
- Latino Community. Increase level of comfort, trust, relationship, engagement and empowerment. Develop Latino-specific strategies.

Across the board best practices include holding meetings at convenient times and venues for participants, provide culturally specific refreshments, and compensate participants for their time.

To view the full report, visit the following website: [http://www.oregonmetro.gov/sites/default/files/Metro\\_Equity\\_Strategy\\_Group\\_Discussions\\_Report\\_Appendix.pdf](http://www.oregonmetro.gov/sites/default/files/Metro_Equity_Strategy_Group_Discussions_Report_Appendix.pdf)

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## Appendix D - Culturally specific community engagement findings (Round 3)

Metro issued eight contracts to community-based organizations and facilitators to hold a series of community discussion groups. The intent of the community discussion was to bring together a group of community members from across the region and introduce them to Metro, the draft Strategic Plan to Advance Racial Equity, Diversity and Inclusion, and gather feedback and various perspectives to address racial disparities in the region. Discussions were with the following communities: Native American, African American, Latino, Slavic and Russian, African, immigrant and refugee, Asian and Pacific Islander and youth. Some of the facilitators and participants had taken part in the two previous community discussions in 2015, thus were more familiar with Metro and the equity strategy, allowing for a deeper discussion.

The organizations or facilitators included:

- Mohamed Abdiasis, Operations Manager Africa House
- Isatou Jallow, Community Organizer/ Energy Assistant Specialist Africa House
- Duncan Hwang, Associate Director, Asian Pacific American Network of Oregon
- Kayse Jama, Executive Director, Center for Intercultural Organizing
- Carmen Madrid, President and Owner, CTM Consult, LLC



- Maria Caballero-Rubio, Executive Director, Centro Cultural de Washington County
- Juan Carlos Gonzalez, Development Director, Centro Cultural de Washington County
- Samuel Gollah, Facilitator, Gollah Consulting, LLC
- Diego Hernandez, Co-Executive Director, Momentum Alliance
- Cary Watters (Tlingit), Community Engagement Manager, Native American Youth & Family Center
- Cat Goughnour, Principal, Radix Consulting Group, LLC

- Maria Gvozdicova, Community organizer, Russian Speaking Network
- Anna Volkova, Community organizer, Russian Speaking Network

Metro staff held nine discussion groups with more than 140 community members, including discussions held in Spanish, Vietnamese, Russian and Chinese. Each participant was asked the following questions:

1. What does equity look like to you? (Related to hiring, community engagement, safe and welcoming spaces, etc.)
2. From your perspective, what action areas do you think Metro should tackle first?

3. What else can Metro do to address equity in the region that isn't included in this plan?

While each discussion was slightly different, the facilitators conducted culturally appropriate engagement to ensure that the community felt safe and welcomed to share ideas and opinions. Each discussion was held in a space familiar to the community, at a time that was most convenient to the group and food was provided. Metro staff were present and provided information about Metro, context for the meeting and a high-level overview about the strategic plan.

These conversations varied in language and in process, but overall a few major themes

emerged, including the need to develop a common language and understanding of racial equity in the community. Participants also identified the need to invest in existing leadership development programs to grow future leaders of color and to provide paid internship or career development programs for youth of color. And, they encouraged Metro to continue to hire and support staff that reflects the demographic make-up of the region.

The facilitated conversation helped Metro's efforts to expand and deepen community engagement and partnerships with communities of color in our region and informed the final draft of Metro's

Strategic Plan to Advance Racial Equity, Diversity and Inclusion.

Each facilitator or organization submitted summary reports that captured the key themes heard during the discussion, key questions participants asked, and priority actions recommended by participants.

Summary reports were shared with decision-makers at Metro and can be found at the following website: [http://www.oregonmetro.gov/sites/default/files/Community\\_discussion\\_report\\_final\\_2016.pdf](http://www.oregonmetro.gov/sites/default/files/Community_discussion_report_final_2016.pdf)



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## Appendix E - Advancing racial equity: online survey report

Metro hosted an online survey between February 22 and March 18, 2016 to solicit feedback from the public about Metro's equity strategy. In 2010, the Metro Council adopted equity as one of the region's six desired outcomes. The equity strategy is an organizing framework initiated by the Metro Council in 2012 to incorporate and apply equity more consistently across its program, policies and services – in collaboration with community, city and county partners. The online survey asked three key questions related to actions Metro can take to improve its policies, programs and services in order to advance equity:

- What should Metro prioritize in order to advance equity?

- What should Metro measure in order to know it is successful in advancing equity?
- What else can Metro do to address equity in the region?

1,194 survey responses were submitted. This executive summary outlines the main themes provided by the public through the online survey. The full report provides a summary of responses to each question in the online tool.

## Equity priorities

Participants were asked to choose three areas that Metro should prioritize in order to advance equity. Over half (55%) said that collaborating more with communities of color should be a top priority. 45% said that Metro should prioritize hiring, training and promoting a racially diverse workforce, and 36% said Metro should prioritize providing more investment opportunities to support small businesses owned by or community based organizations that serve people of color.

## Measures of Success

Participants provided suggestions for what Metro should measure to determine whether it is successfully advancing equity. The survey listed three example measures of success, and these received a high level of support by many participants. They included:

- A higher percentage of Metro contracts are awarded to minority/woman owned firms.
- Racial diversity is increased at all employment levels at Metro, including management positions.
- More people of color visit Metro destinations and participate in services.

Participants provided many other potential measures.

Overall, the greatest support was for the following measures of success:

- An increase in racial diversity at all employment levels at Metro—particularly at the management and decision-making level. Many noted that the makeup of Metro’s workforce should reflect the diversity of the region’s community, and that a more diverse workforce will be better able to provide programming and services that meets the needs of the broader community.

While most of the comments supported increased racial diversity and contracts as a measure of success, there was some concern about hiring and contracting based on race. Some noted that the main qualification for employment or contracting should be merit and skill—not ethnicity, and would prefer a “color-blind” hiring practice.

- More people of color visit Metro destinations and participate in services.
- A higher percentage of Metro contracts are awarded to minority/woman owned firms.
- An increase in participation and feedback from communities of color—particularly participation in

decision-making and advisory roles. Survey participants suggested that Metro track engagement levels of people of color at its meetings, forums, surveys, workgroups, committees, and other efforts. In particular, participation at the decision-making level should be tracked. A successful outcome would be when the demographic participation at Metro’s forums, meetings, and advisory boards reflects the diversity of the Metro area.

- Workforce/employment levels in the region reflect the diversity of the population. An increase in regional workforce diversity and a general increase in minority employment—especially in management positions—would be a measure of success.
- Increase in the number of minority-owned small businesses in the region, and their level of long-term success.
- Reduction in racial disparities across major life outcomes. This includes areas such as income equality, graduation rates, unemployment rates, and crime rates—as well as increased affordable housing and homeownership by minorities. Success could be measured by reduced



disparities between minority and white residents, as well as more targeted investments in areas that have been traditionally underserved.

- Increased number of Metro staff that attend trainings to increase cultural awareness and proficiency, and that can show that they have a good understanding of diversity and equity issues. This could include monitoring outcomes of the trainings to determine how trainings change the way Metro provides services and programming.

## **Other actions Metro can take**

Participants provided suggestions for what else Metro can do to advance equity in the region. Their responses ranged from comments on the types of programs or policy areas that Metro should focus on; how Metro conducts business and internal hiring; how Metro can support other businesses and partners; outreach and engagement techniques; and Metro's role in equity-related work.

### **Support for Program and Policy Areas that Metro Should Focus On**

Many people supported efforts to increase the availability of affordable housing and to address the housing crisis and shortage of housing in the Metro region—noting that housing security is a crucial first step to improving the quality of life for minority and low-income populations.

Many people supported efforts to improve the quality of education and access to education in the region. They noted that good quality public schools is the best way to pull people out of the cycle of poverty, and is an equitable way to improve opportunities for all people.

Many comments support efforts to promote and support jobs in the region. People would like to see increased focus on jobs creation and infrastructure that supports jobs and economic development.

Many people supported efforts to increase the availability, access and quality of public transportation to serve low-income and minority communities.

### **Defining Equity and Metro's Role**

Some expressed concern that promoting equity is not part of Metro's charter and that Metro should not use funding to promote equity in the region. Some of these people felt that it might be appropriate for Metro to promote diversity within its own workplace, but not beyond that. They suggested that Metro focus on equality and fair treatment of all people rather than treating some races differently.

### **Outreach and Engagement**

Many suggested that Metro focus on efforts to get input from and directly engage with racially diverse/minority organizations and individuals. They suggested that Metro specifically seek out hard-to-reach communities using non-traditional and creative methods. They showed support for efforts by Metro to develop information and marketing targeted to low-income and minority individuals, to help make them more aware of Metro services and opportunities.

### **Doing Business**

Many suggested that Metro focus on internal equitable hiring practices such as focused recruitment of minority job applicants, valuing cultural competency and equity-building skills as a means for promotion, and ultimately hiring a more diverse workforce, particularly at the management level.

Many would like to see Metro engage in more partnerships (especially paid partnerships) with organizations that serve people of color and minority-owned businesses.

To view the full report, visit the following website: [http://www.oregonmetro.gov/sites/default/files/Advancing\\_racial\\_equity\\_online\\_survey\\_report\\_2016.pdf](http://www.oregonmetro.gov/sites/default/files/Advancing_racial_equity_online_survey_report_2016.pdf)

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## Appendix F - Internal stakeholder engagement findings

### External themes and tactical ideas

The following are the list of themes that have been consistent over all of the small group discussions with Metro staff. These themes are specific only to those areas that are external (having a community impact) to Metro.

<b>CONSISTENT THEMES - EXTERNAL</b>	<b>BRIEF DESCRIPTION</b>
Invest in strengthening community relationships	Prioritize resources to build and maintain community relationships and focus on strengthening engagement approaches to increase involvement and partnerships with communities of color.
Ensure affordability	Increase affordability as well as transit, language, cultural and gender accessibility to all Metro parks and venues.
Increase community ownership over decision-making	Adjust practices to increase community involvement in Metro decision-making and increase Metro's accountability to the community.
Work with jurisdictions to provide stronger, more coordinated services	Expand resources (e.g. financial and recreation) to increase opportunities for communities of color to access and utilize Metro's services and destinations to their full potential.
Expand internal internships	Metro internships provide unique opportunities for employment experience and networking. These internship opportunities should be expanded. Additionally, partnerships with community based organizations should be strengthened to improve connection to these opportunities for communities of color.

<b>CONSISTENT THEMES - EXTERNAL</b>	<b>BRIEF DESCRIPTION</b>
Improve community understanding of Metro's role and services provided	Assist communities with understanding the extent of Metro's responsibilities, services offered and destinations managed.
Increase accessibility to contracting/ granting/ procurement	Work with communities to simplify contracting, granting and procurement processes for increased accessibility.
Increase community awareness of hiring opportunities	Strengthen community partnerships and offer outreach services to strengthen community awareness of hiring opportunities.
Prioritize increasing opportunities for marginalized communities	Expand programming and services to support communities who have been historically marginalized.
Increase investment in youth	Metro should focus on advancing career opportunities for youth by expanding its involvement in the classroom, invest in youth leadership programs and expand its internship program.
Advance equity in data collection	Expand data collection methods, placing more importance on qualitative data. Additionally, when available, expand race and ethnicity data collection.
Increased support to assist communities of color through the job application process at Metro	Increase the understanding of the Metro application processes that unintentionally place barriers for marginalized communities to apply for Metro job positions.
Create more supportive advisory committee structures to increase community involvement	Policy to provide compensation, food and transportation to committee members to breakdown participation barriers.

## Internal themes and tactical ideas

The following are the list of themes that have been consistent over all of the small group discussions with Metro staff. These themes are specific only to those areas that are internal (culture, process, dynamics, etc.) to Metro.

<b>CONSISTENT THEMES - INTERNAL</b>	<b>BRIEF DESCRIPTION</b>
Need for equity advocacy tools	Increase the available equity resources, such as trainings and equity decision support tools, to assist staff with applying equity in their work and understand their role in championing equity.
Desire for a organizational culture that is fearless when it comes to advancing equity	Innovation and action to advance equity must be a primary value at Metro that is vocalized and demonstrated by leadership. Currently, in many cases, innovation and action to advance equity tends to be met with hesitancy and mild support from management.
Skills Training	Diversity trainings have been extremely useful for staff. However, not all staff has been able to access the trainings. Additionally, staff would like to interact more with leadership during these trainings and would welcome more trainings around race and unconscious bias.

<b>CONSISTENT THEMES - INTERNAL</b>	<b>BRIEF DESCRIPTION</b>
Diversification of Metro staff (hiring, recruitment and retention)	Currently, the diversity within Metro's staff is concentrated in front-line, temporary, seasonal and part-time positions. Diversity is extremely important and Metro should strive to have the most diverse workforce, at all levels, in the Portland metropolitan region by strengthening hiring, retention and retention practices.
Creation of a succession plan	Metro staff members feel that upward mobility at Metro is extremely difficult. In order to provide clear ladders of advancement for front-line, temporary, part-time, and seasonal staff, a succession plan must be developed.
Amount of process at Metro paralyzes action	Navigating Metro's processes and systems to enact a new program or project is very time consuming and difficult. Therefore, the thought of navigating Metro's system prevents staff from developing new innovative ideas and actions to advance equity.
Need for mentorship and sponsorship programs	Metro staff members feel that upward mobility at Metro is extremely difficult, especially for staff of color. There is a need for support and guidance to increase the opportunities for professional growth at Metro.
Advancing MWESB/CBO contracting and procurement	Increase the availability of trainings for staff to advance social equity contracting practices at Metro. Also, prioritize community partnerships to gain community perspective on how to improve the accessibility of contracting opportunities for MWESB/CBO's.
Improve the effectiveness of internal trainings	The effectiveness of staff trainings have been dependent on the forum and the overall structure of the trainings. Staff recommend assessing the trainings to see which forums and structures have been the most effective and most supportive for staff members to learn.
Equality vs. Equity in service provision	When providing public service, Metro must prioritize identifying barriers that prevent communities from accessing the service then work to break down those barriers.
Creation of opportunities for safe and honest equity conversations between staff members	There is a lack of opportunities at Metro for staff to have safe and honest discussions with each other around equity.
Equity as a guiding value for Metro	Equity should be a guiding organizational value.
Equity = good customer service	Venue staff members see equity as good customer service and are continually striving to advance equity.
Lack of resources to advance DEI efforts in HR	HR needs additional personnel resources to advance Metro's hiring and recruitment efforts.
Lacking time resources for staff participation in DEI efforts	Metro staff members lack the time and the resources to participate in internal DEI efforts.
Expand and improve internal internships	Internships at Metro are a unique opportunity for communities to gain experience in a variety of fields. Currently, there isn't an agency-wide approach to internships and therefore internships at Metro are limited and uncoordinated.

<b>CONSISTENT THEMES - INTERNAL</b>	<b>BRIEF DESCRIPTION</b>
Importance of qualitative vs. quantitative data	Metro places a great amount of weight on quantitative data and not enough weight on qualitative data. This unequal balance needs to change so that qualitative data holds as much significance as quantitative.
Sustain community relationships and improve community trust	Metro must prioritize the creation of new opportunities to continue to build community relationships and trust. Bring the personal back into the work at Metro.
Improve communications and transparency between staff at various levels	Many staff members feel that there is a disconnect between them and their higher level managers. There is a general lack of options for communication and relationship building across staff hierarchy . For this reason, there is a general feeling that there is a lack of transparency related to decision-making within some departments.
Improve access to benefits for all staff members	Front-line, temporary, part-time, and seasonal staff members have difficulties accessing trainings, educational opportunities and other benefits at Metro. These staff members should be prioritized to ensure that they have the same opportunities as other staff members.
Metro Regional Center (MRC) building isolation	The Metro Regional Center (MRC) building is isolated from the other venues and destinations within Metro’s portfolio. This isolation is not just physical. Many feel like the staff at MRC receive priority service support and that internal decisions are made without full input from venues and destination staff.
More visible and vocal leadership support	Metro staff desires more visible and vocal leadership when it comes to advancing equity.
Values at Metro continue to be head over heart	Metro culture places more importance on data, research and other technical areas than non-technical areas such as community relationships.



## Appendix G - Organizational self-assessment related to racial equity - findings

### Background

Metro Upon recommendation from Metro's Equity Strategy Advisory Committee, Diversity, Equity and Inclusion (DEI) program staff decided to complete a Tool for Organizational Self-Assessment related to Racial Equity to inform the Strategic Plan to Advance Equity. The tool, developed by local organizations Coalition of Communities of Color and All Hands Raised, is designed to gather a holistic snapshot of an organization's practices and policies as they relate to racial equity.

In summer of 2015, DEI staff assembled a workgroup representing different areas of the organization to answer questions posed in the tool, identify gaps and make recommendations.

The workgroup met in September and October of 2015 and answered questions within the tool's following categories: Organizational Commitment, Leadership and Governance; Racial Equity Policies and Implementation Practices; Organizational Climate, Culture and Communications; Service-Based Equity; Service-User Voice and Influence; Workforce Composition and Quality; Community Collaboration; Resource Allocation and Contracting Practices; Data, metrics and Continuous Quality Improvement.

In addition to convening the workgroup, DEI staff also engaged with staff of color, four of whom answered these questions:



- Do the organization’s senior leaders act consistently around racial equity, e.g. by allocating sufficient resources for equity initiatives, making racial justice a standing agenda item at key meetings, ensuring people of color are decision-makers? Please provide 2-3 specific examples.
- Do you encourage or support difficult conversations about race in a safe, confidential, private space?
- Describe your organization’s primary physical space (Metro Regional Center) and what it may communicate to diverse stakeholders. Is it welcoming and accessible? Consider the use of height, open spaces, natural or artificial light, art, signage and visual representations and facilities such as gender neutral bathrooms and lactation rooms.
- Describe whether, and how, the Metro Regional Center’s entrance area is welcoming and supportive of diverse individuals and families, e.g. is there comfortable seating and supports for those with children.
- Please provide a couple of examples of how your organizational meetings that involve the public are conducted in a manner that supports equity and inclusion, and values diverse ways of speaking, thinking, debating, reflecting and making decisions.
- Are racial equity and cultural competency training and capacity building made available to your workforce?

## Analysis and recommendations

The assessment workgroup conducted analysis of responses to the tool’s questions in three categories:

- Organizational commitments, which includes the areas of organizational commitment, leadership and governance; racial equity policies and implementation practices; workforce composition and quality; and resource allocation and contracting practices
- Customer and client service, which includes the areas of service-based equity, service-user voice and influence; and data metrics



- Community interface, which includes the areas of organizational climate, culture and communications; community collaboration; and continuous quality improvement

The analysis identified progress, gaps and recommended actions to fill the gaps.

### **Organizational commitments**

Metro has acknowledged the importance of organizational commitments to racial equity and has invested in some internal support structure, including the Diversity Action Plan core teams, the DEI steering committee and the Equity Strategy Advisory Committee. However, leadership doesn't consistently address issues of racial equity nor is there a systematic review of racial equity. Staff of color raise concerns about lack of diversity in leadership and management positions, which prevents people of color from being included as decision makers.

While Metro does not yet have racial equity policies and implementation practices in place, it is anticipated that those will be represented in the developing Strategic Plan to Advance Diversity, Equity and Inclusion which is scheduled to be released in Spring of 2016.

Efforts to address workforce composition and quality occur primarily through goals in the Diversity Action Plan, which is managed by a dedicated Diversity Program Manager position. These goals include recruitment and retention of a diverse workforce and providing ongoing in-house diversity trainings and events to build internal awareness and cultural competency. There are no written procedures to increase recruitment, retention and promotion of people of color, nor do performance objectives and evaluations incorporate racial equity or cultural competency goals. There are few practices or structures to support employees of color. Diversity trainings are not provided to interns, temporary or part-time staff and are not consistently offered across Metro facilities; communities of color do not participate in

development or evaluation of these trainings. Staff of color question the effectiveness of the OUCH trainings and a lack of investment in professional diversity training, as opposed to in-house training.

Difficult conversations about race are very reactive; Metro is not proactive about conversations regarding race. Staff of color don't feel safe or comfortable having those conversations, which carries over into reluctance to honestly answer questions from the Cultural Compass Diversity Survey.

Advancing racial equity in Metro's resource allocation and contracting is ongoing but inconsistent. While Metro has a Minority, Women & Emerging Small Business (MWESB) policy, not all vendors and contractors are required to adhere to the same policy. Racial justice values primarily influence investments through grants and sponsorships to communities; Metro lacks a budget tool to evaluate other investments from a racial equity lens.

### **Recommendations in the area of organizational commitment include:**

- Invest resources of time and funding into implementing the Strategic Plan to Advance Diversity, Equity and Inclusion (priority action)
- Survey staff and communities to determine progress on Strategic Plan to Advance Diversity, Equity and Inclusion implementation
- Make DEI work a critical part of each employee's portfolio and evaluation
- Establish a structure to more effectively recruit and promote diverse staff (priority action)
- Establish written policies on recruitment, retention and promotion of diverse staff
- Involve union leadership in recruitment process and proactively promoting workforce diversity

- Review progress of workforce composition and establish accountability measures
- Ensure that diversity training opportunities are available to every employee across the agency
- Explore using the Portland' 5 model for training part-time staff at all departments and venues with part-time staff
- Involve communities of color in developing, delivering and evaluating diversity and cultural competency training
- Invest in professional, experienced diversity trainers, preferably of color
- They would also like to see Metro leaders and managers take a more in-depth diversity training, such as United to Understand Racism.
- Create trainings around how to hold race conversations to be more proactive
- Explore expanding the Resource Conservation and Recycling division's practice of holding intentional discussions on how to strengthen a culture of respectful communications during the PACE process to all departments and venues

- Create a formal mentorship program to support employees and interns of color
- Increase internal and external accessibility of MWESB program information
- Fund and provide training to current and potential MWESB contractors (priority action)
- Develop a budget tool to make decisions and evaluate investments from a racial equity lens (priority action)
- Regularly report on MWESB investments with a breakdown by project, type of work or service

### **Customer and client service**

Metro's public-facing departments (Parks & Nature, Planning and Development and Property and Environmental Services) and visitor venues (Oregon Convention Center, Oregon Zoo, Portland Expo Center and Portland's Centers for the Arts) are inconsistent in providing language interpretation and translation services to customers and clients, evaluating effectiveness of those services and ensuring those services are adequately aligned with community needs. A similar inconsistency exists in collection of racial, ethnic and linguistic data of customers and clients, especially among the visitor venues; the data that is collected



is primarily voluntary. More data collection is needed, with an improved ability to disaggregate race and ethnicity data. Metro does not reveal race/ethnicity data in a way that is accessible to staff and the public.

While all these departments and venues make service delivery decisions to respond to service-user data, service-user voice and incorporate goals of service equity, evidence-based decisions regarding communities of color are inconsistently reviewed with impacted communities. Visitor venues, with the exception of the Oregon Zoo, do not assess their impact on who is visiting; their assessments focus specifically on customer service. Metro does not collect data on customer or client satisfaction regarding racial equity.

**Recommendations in the area of customer and client service include:**

- Promote available interpretation and translation tools among staff, customers and clients; provide interpretation and translation information on visitor venue websites
- Encourage staff to consult with DEI staff about important documents that might need translation
- Include an overarching goal statement in the Strategic Plan to Advance Diversity, Equity and Inclusion about effectiveness of language services
- Translate important information on key visitor venue webpages into top four languages spoken in the region
- Develop best practices around language services that can be tailored for each visitor venue
- Build internal awareness about value of collecting customer and client data to ensure services are reflecting community needs in the region

- Build internal awareness about Data Resource Center services and resources that identify audience data and demographics
- Explore how the Oregon Zoo's tracking of ethnicity data could be implemented at other venues
- Conduct peer research among visitor venues in other cities to determine best practices and value of collecting customer and client data
- Explore feasibility of using Google Analytics, in conjunction with a review of Metro's privacy policies, to determine demographic data of website visitors
- Explore leveraging Portland' 5, Expo Center and OCC's strong relationship with Travel Portland to conduct a racial equity assessment of visitor venues
- Collect all examples of decisions made to respond to customers, clients and communities of color in a separate document for departments and venues to review and identify what could be adopted and tailored for their own facilities; encourage conversations that weigh the benefits of innovation, flexibility and racial equity over business risk
- Incorporate satisfaction with racial equity into customer and client surveys
- Create "How are we doing" webpages to invite customer and client satisfaction with racial equity at departments and visitor venues
- Explore opportunities within the new Portland' 5 Presents program to tailor marketing, tickets giveaways, customer assessments and other practices for communities of color

## Community interface

Metro's primary facility, the Metro Regional Center (MRC), is not seen as welcoming or inviting to diverse communities. The first person most MRC visitors encounter tends to be a security officer, which does not create a welcoming environment for many communities and staff. The MRC lacks visual commitment to community and racial equity. It does not display visual images of the communities it serves, which is indicative of the lack of diversity in Metro's image library, and visual commitment to language support does not go beyond meeting minimum federal requirements. Organizational materials posted at MRC are not assessed for racial bias and are not reviewed to ensure reflection of community diversity. Lack of clear directional signs makes wayfinding very difficult and locations of gender-neutral bathrooms and lactation rooms are not generally known.

Metro Council meetings are seen as very intimidating and unwelcoming for the general public and staff.

While Metro has formal, ongoing partnerships with organizations of color, culturally-appropriate engagement practices are not consistent across the agency. At the venues, partnerships tend to be informal. Most formal partnerships are found within sponsorship recipients, but sponsorships to communities are not equitably distributed across the agency.

Metro lacks a formal internal structure for departments and venues to share current or emerging issues in communities of color.

Recommendations in the area of community interface include:

- Re-orient the lobby to welcome people entering from both Grand Avenue and Apotheker Plaza
- Use the Apotheker Plaza to display community art, murals, or statues to provide a more welcoming, diverse feel; display the flags from all the jurisdictions that Metro represents

- Provide ample and comfortable seating in the MRC entry area
- Increase images of diversity in Metro's image library
- Create a community board in the MRC lobby that outlines all upcoming community events and projects
- Provide wayfinding at MRC in multiple languages
- Identify opportunities to go beyond code requirements for accessibility as part of MRC space planning project
- Have a few members of the Public Engagement Review Committee participate in the MRC space planning project
- Make lactation rooms dedicated to lactation activities in a welcoming environment
- Develop guidelines and checklist to test organizational materials for racial bias and have them reviewed and assessed by the Public Engagement Review Committee and/or the Equity Strategy Advisory Committee
- Provide information on what to expect when attending a Metro Council meeting, including how to testify, in multiple languages
- Integrate sponsorship best practices among MRC and visitor venues
- Make the development of Metro's Affirmative Action Plan a standard practice; ensure the Affirmative Action Plan is easily accessible to staff and the public
- Make ESAC a formal standing body which could be the location where the discussion on racial equity within the entire Metro organization takes place



## Appendix H - Racial equity guidance questionnaire

DEI Program staff has developed a draft 13-point questionnaire to guide the analysis of existing policies, procedures, programs, investments and services to determine how well they advance or hinder the practice of racial equity in the agency. The 13-point questionnaire is also intended to help staff ensure that new policies, procedures, programs, investments and services fully consider and incorporate racial equity.

This questionnaire is intended to be customized during the implementation phase of this Strategic Plan by individual departments, divisions, programs and venues to meet their specific needs. Departments and venues will be required to create their own specific equity action plans, and this questionnaire will help them develop and implement those action plans.

The draft racial equity analysis and decision support tool includes the following questions:

1. Identify the established racial equity-related outcome desired by the policy/ procedure/ program/service/ investment /decision that will undergo the application of this tool.
2. Describe the policy/procedure/program/ service/investment / decision that will undergo the application of this tool.
3. Describe the existing data or information that will guide this policy/procedure/program/ service/investment /decision. If no relevant data is currently collected, describe the data that should be collected and identify ways to do so.

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| <p>4. Describe the historic and current inequities and disparities related to this policy/procedure/program/service/investment/decision.</p> <p>5. Identify what individuals, groups or communities will benefit from this policy/procedure/program/service/investment/decision.</p> <p>6. Identify what individuals, groups or communities will be burdened by this policy/procedure/program/service/investment/decision.</p> <p>7. Identify the factors that may be causing and maintaining the benefits and burdens on the individuals, groups and communities identified above.</p> <p>8. Engage the individuals, groups or communities that are most impacted by this policy/procedure/program/service/investment/decision to learn from their lived experience and enhance value and impact of the application of this tool.</p> | <p>9. Describe the geographic distribution of public resources or investments associated with this policy/procedure/program/service/investment/decision.</p> <p>10. Identify how this policy/procedure/program/service/investment/decision can mitigate its disproportionate burdens and enhance its positive benefits.</p> <p>For decision-support applications of the tool:</p> <p>11. Describe how the decision about this policy/procedure/program/service/investment will be made, including:</p> <ul style="list-style-type: none"> <li>• Who will make the ultimate decision?</li> <li>• Who will be consulted about the decision?</li> <li>• Who could be missing in the decision-making process? And how can they be included in it?</li> </ul> | <p>12. Identify and describe the barriers that staff, community members and decision-makers may encounter to make changes in the policy/procedure/program/service/investment to advance racial equity.</p> <p>13. Describe the action plan to remove the barriers in decision-making to advance racial equity through this policy/procedure/program/service/investment.</p> <p>The customization of the questionnaire and the overall tool for each department and venue's specific needs will include additional participation of community members. They can inform and enrich the process by providing the perspective from their lived experience and particular expertise.</p> |
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## 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 good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 25 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

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