

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF APPROVING THE
STRATEGIC PLAN TO ADVANCE RACIAL
EQUITY, DIVERSITY AND INCLUSION

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)
)

RESOLUTION NO. 16-4708

Introduced by Chief Operating Officer Martha
Bennett in concurrence with Council
President Tom Hughes

WHEREAS, the Metro Council adopted equity as one of the region's desired outcomes in 2010 and in 2011 directed Metro staff to initiate the development of an organizing framework that consistently incorporates equity into all Metro decisions;

WHEREAS, 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;

WHEREAS, Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion builds on the extensive equity work that Metro departments and venues have been conducting for a number of years;

WHEREAS, Metro staff engaged a number of community-based organizations, members of diverse communities in the region, especially people of color, and other stakeholders in the creation and review of the agency's Strategic Plan to Advance Racial Equity, Diversity and Inclusion;

WHEREAS, Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion will provide a unified strategic direction and additional focus for the crucial equity work currently being conducted by Metro;

WHEREAS, Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion will be modified as needed according to the results it achieves, evolving conditions in the Portland metropolitan region, future changes within Metro and other unforeseen events; and will be updated in 2021, to coincide with the five-year implementation horizon of this initial plan; and

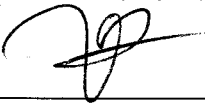
WHEREAS, Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion is ready for Metro Council adoption and support.

BE IT RESOLVED that the Metro Council:

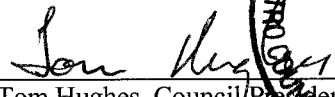
1. Supports the goals, objectives and actions items outlined in the Strategic Plan to Advance Racial Equity, Diversity and Inclusion, attached as Exhibit A to this resolution; and
2. Approves Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion in order to eliminate racial disparities and achieve more equitable outcomes for all people in the region.

ADOPTED by the Metro Council this 23 day of June 2016.

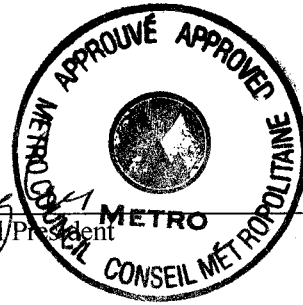
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Metro

Exhibit A

Exhibit A

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.

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Kathryn Sofich, Michael Jordan, Mike Hoglund, Molly Vogt, Nikolai Ursin, 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
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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 gaps¹. 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

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 areas 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 those with 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.

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.

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 data sets 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 broad categories that will be used consistently across the agency to establish a baseline (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, Metro leadership 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 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.60) 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 goals 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.² 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.

2 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/

HOMEOWNERSHIP BY RACE AND INCOME

American Indian or Alaskan Native	39.2%
Black or African American	33.1%
Native Hawaiian or Pacific Islander	27%
Asian	62.6%
Hispanic or Latino	34.8%
White	64.2%
Some other race	31.6%
Low-income Households	39.4%

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

Metro department-specific action plans

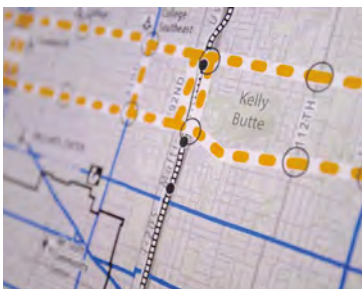
Beginning on page 19, this Strategic Plan presents five agency-wide goals and proposed actions to move Metro toward reaching each goal. The actions involve areas such as engagement, procurement, resource allocation, communications, hiring, retention and accessibility of facilities.

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 address 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: 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 22 to 49.

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.



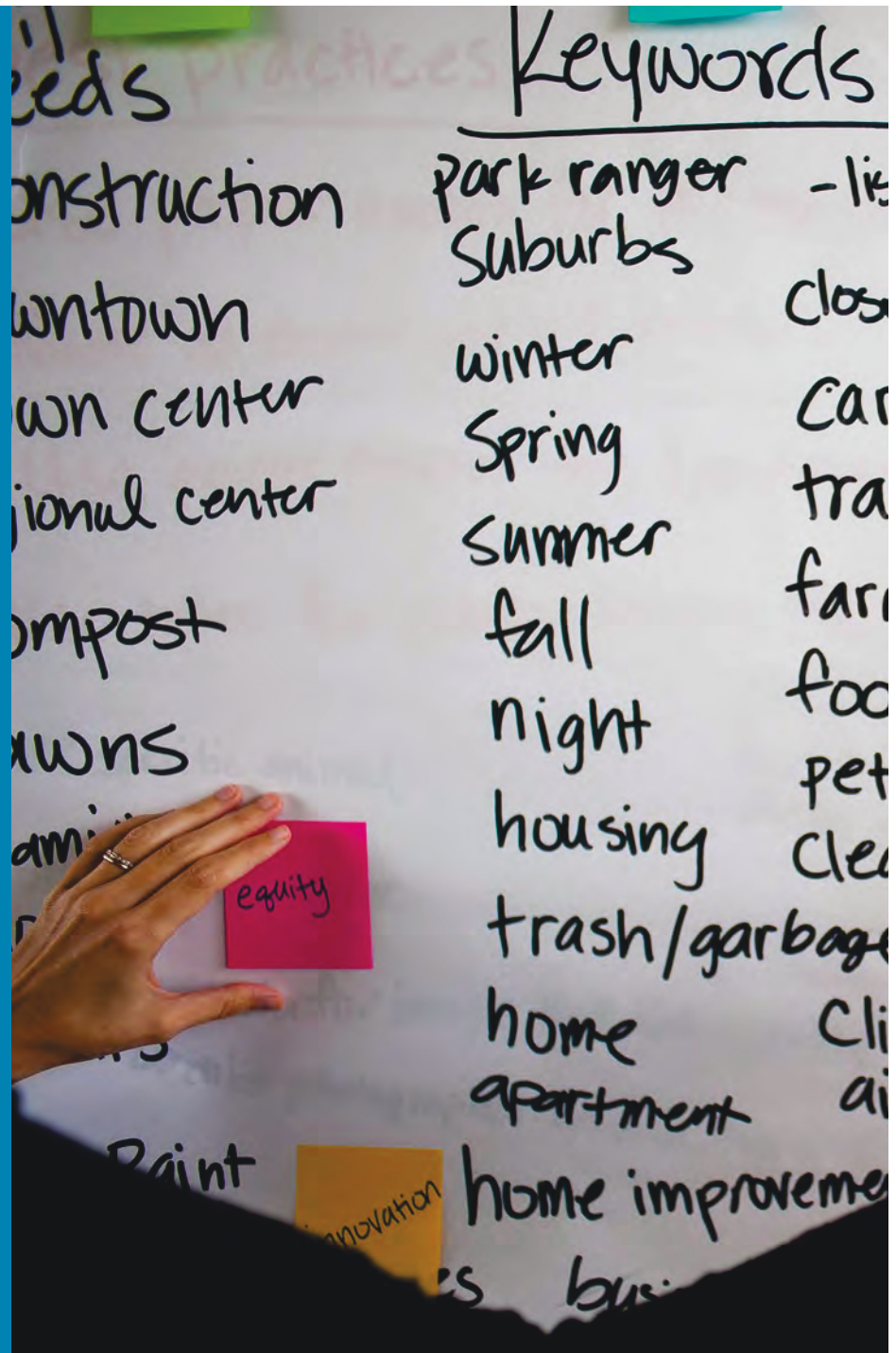
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Goal A

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?

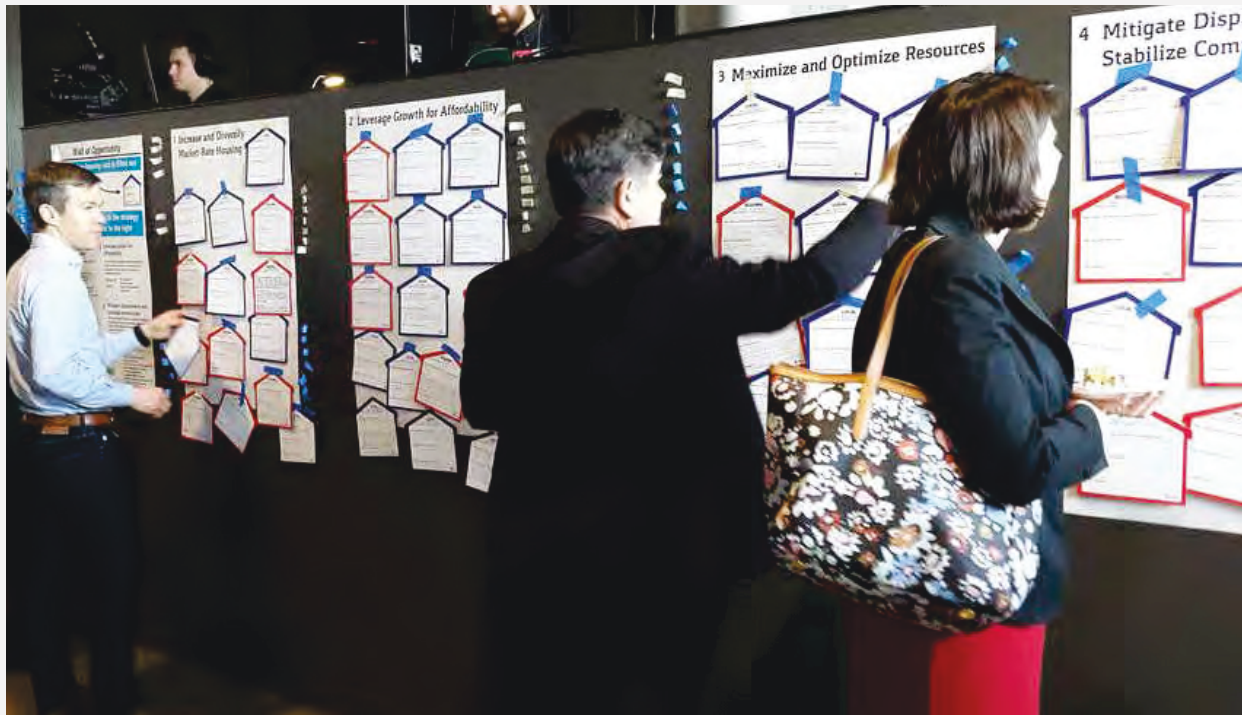
As a regional government, Metro is in a unique position to bring together public, private, philanthropic, and community partners throughout the Portland region to coordinate efforts to advance racial equity.

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 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.

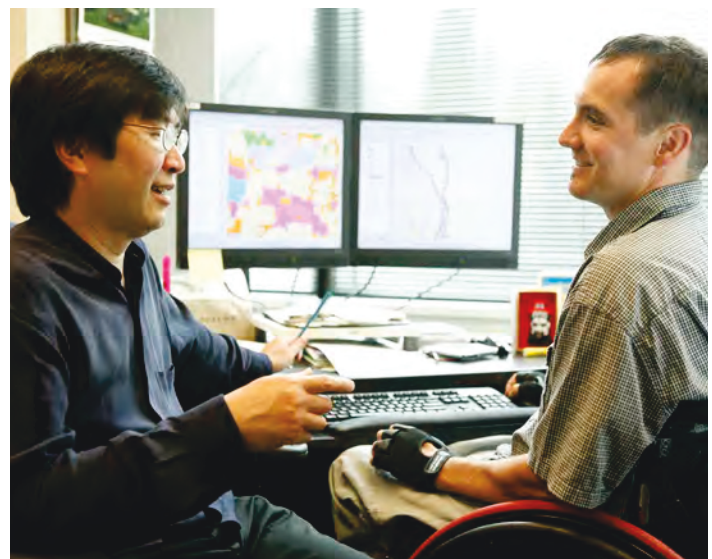
"Both sides wanted to go into that room with the condition that certain things could not be on the table," Murray said. "But my condition was that if you were going to be at this table, you had to be open to listening to anything."

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.	Fiscal year 2017/2018
Jurisdictional, business and community partners have limited opportunities to work collaboratively to advance equity by sharing best practices, tools for evaluation and other resources.	<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"> • public engagement • stable and affordable housing • welcoming and inclusive parks and venues • accessible, safe and affordable transportation • equitable practices in the solid waste system • economic opportunity for communities of color through local government contracts and projects 	After 2017/2018 fiscal year



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.	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">• public engagement• stable and affordable housing• welcoming and inclusive parks and venues• accessible, safe and affordable transportation• equitable practices in the solid waste system• economic opportunity for communities of color through local government contracts and projects.	After 2017/2018 fiscal year

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.	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">• public engagement• stable and affordable housing• welcoming and inclusive parks and venues• accessible, safe and affordable transportation• equitable practices in the solid waste system• economic opportunity for communities of color through local government contracts and projects.• developing common language and understanding of racial equity.	After 2017/2018 fiscal year

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.	Fiscal year 2016/2017
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"> • enhancing apprenticeships • identifying technical and resources needs • continuing to invest in and convene the Workforce Diversity Summit 	Fiscal year 2016/2017
Local minority, women and emerging small businesses (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).	After 2017/2018 fiscal year

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 or 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.	Utilize the racial equity analysis and decision-support tool (see page 58) on four pilot projects representing each of Metro's four lines of business: garbage and recycling, land use and transportation, parks and nature, and venues.	Fiscal year 2016/2017
	Provide training and support to Metro departments on the racial equity analysis and decision-support tool (see page 58) to best meet specific departmental portfolio.	Fiscal year 2017/2018
	With the direct support of the DEI program, expand the pilot for utilizing the racial equity analysis and decision-support tool (see page 58) within the programs, services, plans, and policies of each department.	Fiscal year 2017/2018
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.	Fiscal year 2016/2017
	Develop equity performance measures to include within Metro's balanced scorecard.	Fiscal year 2016/2017
	Create mechanisms to involve the community in the implementation and evaluation of the Strategic Plan.	Fiscal year 2016/2017
	DEI program creates, publishes and submits annual equity report to Council, for publication and broad distribution.	Fiscal year 2017/2018
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.	After 2017/2018 fiscal year



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.	After 2017/2018 fiscal year
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.	Fiscal year 2017/2018
	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.	After 2017/2018 fiscal year
	Create financially supported volunteer seats on advisory boards and committees for youth of color, community members, and community-based organization representatives.	After 2017/2018 fiscal year
Communities find it difficult to become aware of engagement, employment, contract and volunteer 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.	After 2017/2018 fiscal year
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.	Fiscal year 2017/2018

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

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, 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.





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 to offer early employment opportunities at the Oregon Convention Center for people who were in danger of being adversely impacted or displaced by construction of the facility. 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.



Map of 2016 First Opportunity Target Area expansion

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.	Department leadership work with DEI program staff to determine how equity, diversity and inclusion can be addressed as part of work duties.	Fiscal year 2017/2018
	Determine diversity, equity and inclusion criteria so that they can be clearly incorporated as part of the performance management review (PACe) for all staff.	After 2017/2018 fiscal year
Equity is not yet perceived by all employees to be a top priority at Metro.	Adopt policy that Metro management positions must attend required DEI related trainings.	Fiscal year 2017/2018
	Reassess Metro values to ensure diversity, equity and inclusion are equally recognized as guiding principles.	After 2017/2018 fiscal year
	Incorporate equity discussions into all Metro advisory committees to ensure that these bodies uphold the same commitment to equity.	After 2017/2018 fiscal year
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.	Fiscal year 2017/2018
Metro leadership should provide more explicit and clear direction to advance equity.	Staff and management from every department are actively involved in the implementation of the strategic plan and DAP through a clear and representative process.	Fiscal year 2016/2017
	Develop an internal and external communication strategy to convey Metro's leadership commitment to diversity, equity and inclusion.	Fiscal year 2017/2018
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.	After 2017/2018 fiscal year



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.	Fiscal year 2016/2017
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.	After 2017/2018 fiscal year
	Identify and propose a variety of new learning methods and trainings to reach all regular status staff.	After 2017/2018 fiscal year

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.	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
	Partner with and invest in local communities of color and CBOs to attract more diverse applicant pools.	After 2017/2018 Fiscal Year
	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 career ladders for staff advancement.	Create a pilot employee resource group for staff of color. Explore possibility to expand this format to other employee communities.	Fiscal Year 2016/2017
	Create a pilot professional mentorship program to cultivate front-line staff of color for leadership positions.	After 2017/2018 Fiscal Year
	Develop a succession plan for all levels in organization.	After 2017/2018 Fiscal Year
	Identify and propose ways to increase pathways for Metro staff to gain skills for career advancement.	After 2017/2018 Fiscal Year
Metro hiring managers have limited understanding, skills and resources to advance equity through their hiring process.	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 PERFORMING ARTS VENUES FOR COMMUNITIES OF COLOR

Metro is working to make its Portland'5 performing arts centers more accessible to communities of color.

In February, Portland'5 hosted Black Violin, a musical duo from Fort Lauderdale, Fla., that brings classical strings to life with a modern sound at Arlene Schnitzer Concert Hall. 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.

Portland'5 provided admission and transportation to 14 Title 1 Portland Public schools to a performance of Black Violin. For many of the 2,400 youth, it was their first time downtown and first concert.

Baptiste and Sylvester spoke directly to the students, encouraging them to dream big and find new ways of doing things.



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

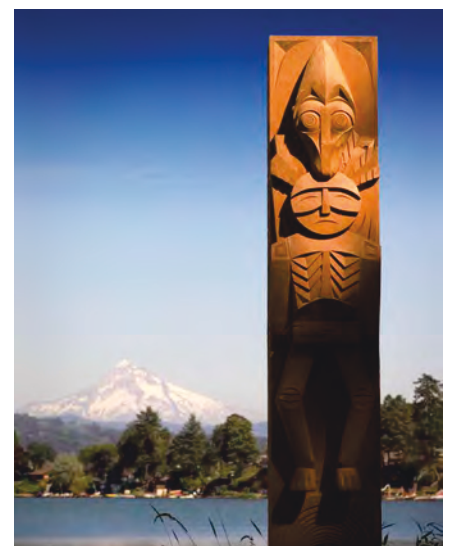
CHALLENGE	ACTION	START YEAR
Metro staff and community have limited awareness of resources to advance equity at facilities and through services.	Communicate available language resources and translation tools to staff and the public.	Fiscal year 2017/2018
Metro destinations should be available for more diverse, cultural events for communities.	Provide increased access for youth of color to Metro venues, parks and programs.(Examples include providing culturally relevant art events for Title 1 schools at Portland's, nature education for Title 1 schools at the Oregon Zoo, and access to natural areas and programs at Metro parks.)	Fiscal year 2016/2017
	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
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).	After 2017/2018 fiscal year
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.	After 2017/2018 fiscal year



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.	Within 12 months of this plan’s adoption, pilot the development of department-specific plans of action to advance equity within programs, services, plans and policies in the following four departments: Parks and Nature, Planning and Development, Property and Environmental Services and the Oregon Zoo.	Fiscal year 2016/2017
	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 remaining department and venue within 12 months.	Fiscal year 2017/2018
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).	Fiscal year 2017/2018





CONNECTING DISADVANTAGED YOUTH WITH NATURE THROUGH THE OREGON ZOO

Metro's Urban Nature Overnights (UNO) 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. In addition to missing out on the health benefits, children who lack firsthand experiences in the natural world are ill prepared as adults to make decisions regarding the environment.

The Oregon 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.

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.

Campers are taught by Zoo UNO staff and Zoo Animal Presenters (ZAP). 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.

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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 agency-wide equity criteria for grants, investments and sponsorships to increase impact and investment consistency.	Fiscal year 2017/2018
	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.	After 2017/2018 fiscal year
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).	After 2017/2018 fiscal year

QUICK GLOSSARY

COBID :

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 methods 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 become skilled construction tradespeople?

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 construction for women and people of color.

Nationally, fewer than three percent of the construction workforce 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 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 of job opportunities.



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. Communities 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.³ 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.⁴

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

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

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.⁶ 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

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.

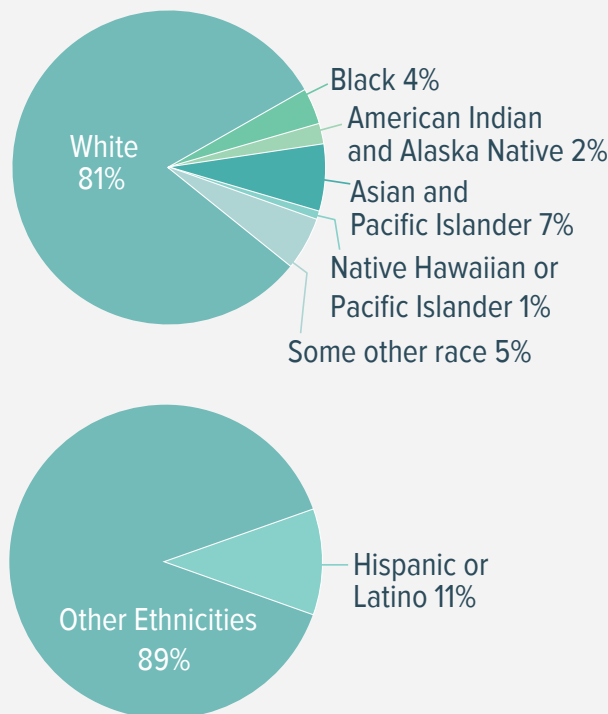


Chart 4 data: Portland metropolitan region 2010 U.S. Census and 2009-2013 ACS 5-year

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:

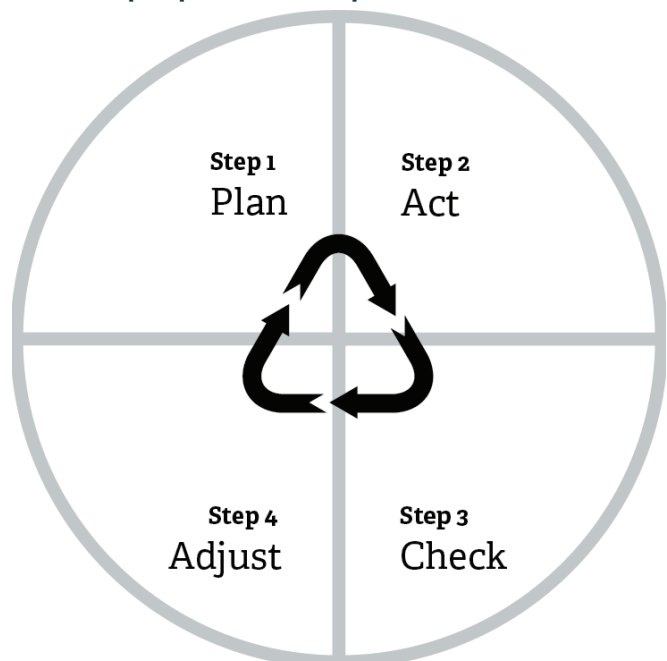
- Set and evaluate success indicators, progress measures and behavior impacts.
- Meaningfully involve a diverse array of Metro staff and community members.
- Dedicate sufficient resources for efficient and effective action completion.
- Provide sufficient level of authority to implementation teams to 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 56.

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 3: CHECK

STRATEGIC PLAN EVALUATION TEAM

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



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.



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 55.

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:^{7,8}

- Increases accountability to community.
- 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.

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

8 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

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 Government⁹, 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

⁹ Government Alliance on Race and Equity. (2015) Advancing Racial Equity and Transforming Government: A resource guide to put ideas into action.



QUICK GLOSSARY

Unconscious Bias:

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

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 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. Once the decision-support tool has been refined and Metro staff have gained experience in its application, the DEI Program staff will use the tool as the foundation of the creation of an agency-wide budget decision-making tool to infuse greater racial equity in Metro's resource allocation. It is anticipated that this racial equity budget decision-making tool will be developed by the 2019-2020 fiscal year.

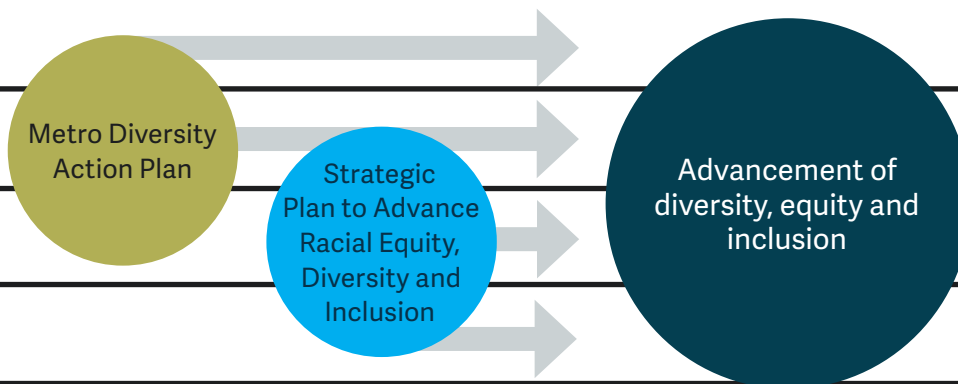
FORMS OF RACISM

INDIVIDUAL

INTERPERSONAL

INSTITUTIONAL

STRUCTURAL



FOUR FORMS OF RACISM:

1. 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, 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.

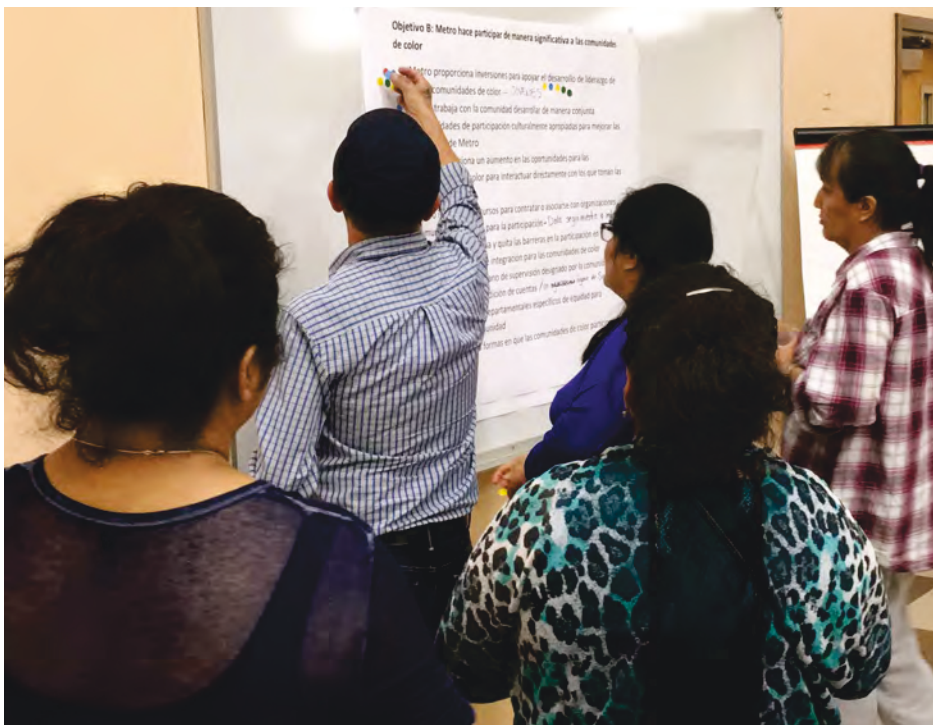
Community Engagement

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, and 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?

Collaborate more with communities of color to improve Metro's decisions, program design and accountability practices.

619 responses

Hire, train and promote a racially diverse workforce.

512 responses

Provide more investment opportunities to support small business owned by or community based organizations that serve people of color.

407 responses

Train and support all staff to become culturally proficient and equitably serve all residents of the Portland Region.

342 responses

Build regional partnerships to create a jobs pipeline to increase the local skilled and diverse construction workforce.

305 responses

Improve practices to ensure communities of color are aware of Metro's diverse services, programs and destinations.

299 responses

Bring together diverse regional partners to reduce racial disparities and improve outcomes for communities of color.

280 responses

Provide data and research to support regional partners in equity initiatives.

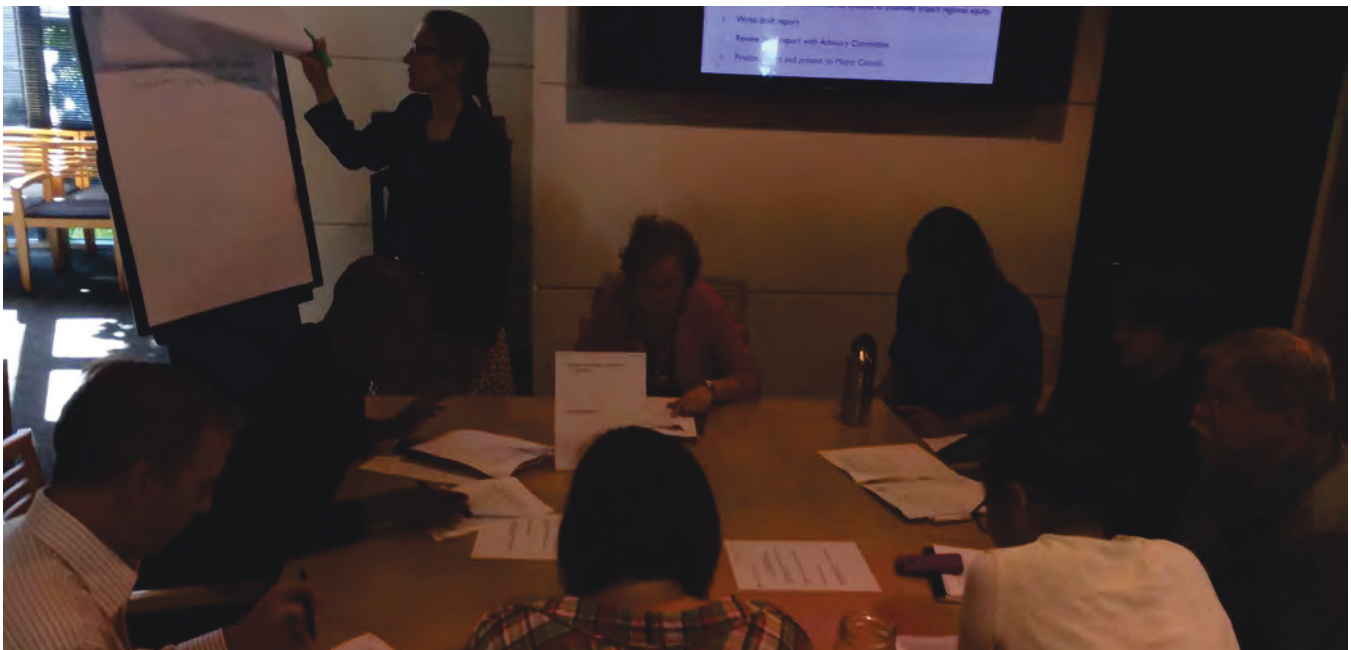
226 responses

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 venue 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

In 2010, 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 PLANS 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 22 to 49.



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 - 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

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

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

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

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.

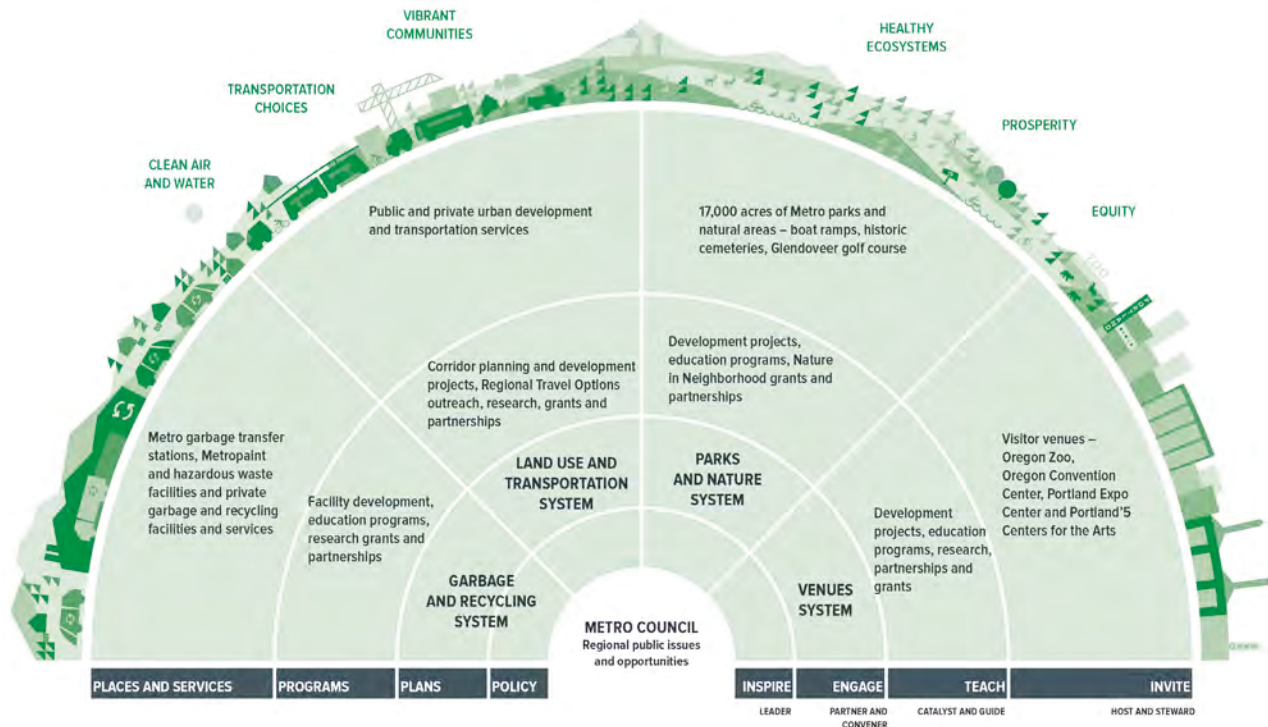
Unconscious bias (or implicit bias) - Unconscious attitudes and stereotypes toward individuals and social groups that affect our understanding, actions and decisions.

– 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

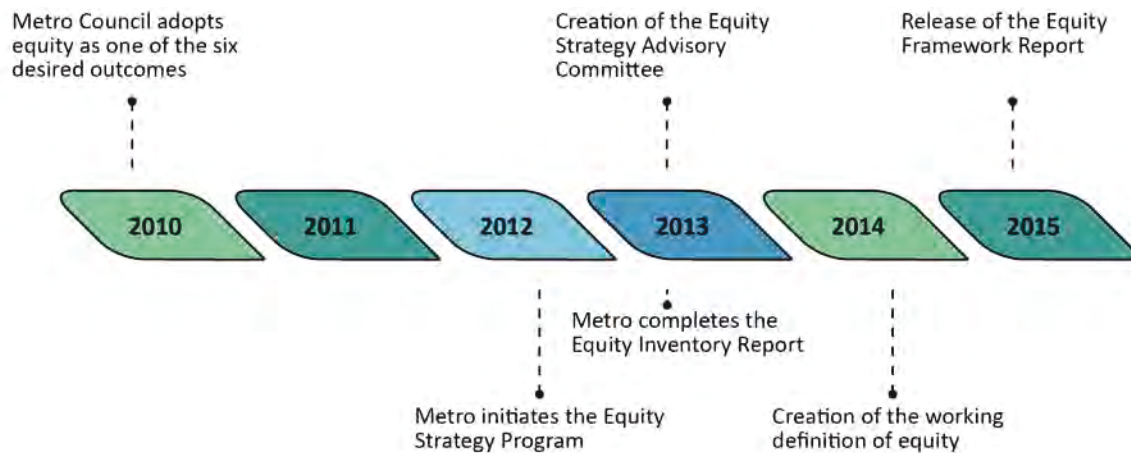
Metro is the regional government for the Portland metropolitan region. The agency's 1,600 employees work in performance venues, cemeteries, classrooms, natural areas and parks, an exhibition hall, a convention center, administrative offices, recycling and garbage transfer stations, a paint remanufacturing 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 project 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 (currently Unite Oregon), 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>





Appendix C - Culturally specific community engagement findings (Round 2)

The following summary report was written by the MultiCultural Collaborative and it provides a review of the second round of Metro's Equity Discussion groups that took place in fall 2015. The focus of the discussion groups was intended to provide a feedback loop to the previous participants to check the validity of Metro's "Key Themes from the Community Discussion Groups" and "Stakeholder Feedback Key Themes to Advance Equity" in the region.

The MultiCultural Collaborative and Metro convened six culturally specific groups, one youth group, and two subject matter expert discussion groups to provide feedback on Metro staff's recommendations for long-term strategies and action items.

The culturally specific groups recommended several key themes that aligned with their goals to advance equity, including:

1. Elected leadership, advisory committees and staff should represent the diverse community they support.
2. Metro should use tools to assess how policy, programs, budgets and decisions affect communities of color and low-income people.
3. Metro should conduct culturally appropriate community engagement for programming, policy development and decision-making.
4. Youth voices need to be integrated into Metro's community engagement, decisionmaking and programming.

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 the 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 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. Metro should provide regional coordination for outreach and engagement with diverse communities.





Next Steps

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

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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 in March and April of 2016. 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:

- Abdiasis Mohamed, 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 (currently Unite Oregon)
- Carmen Madrid, President and Owner, CTM Consult, LLC



- María Caballero-Rubio, Executive Director, Centro Cultural de Washington County
- Juan Carlos González, 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. They also 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



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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 providing 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 respondents 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

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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.

CONSISTENT THEMES - EXTERNAL	BRIEF DESCRIPTION
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 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.

CONSISTENT THEMES - EXTERNAL	BRIEF DESCRIPTION
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, investing in youth leadership programs and expanding 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 break down 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.

CONSISTENT THEMES - INTERNAL	BRIEF DESCRIPTION
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 understanding their role in championing equity.
Desire for an 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 some 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.

CONSISTENT THEMES - INTERNAL	BRIEF DESCRIPTION
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.

CONSISTENT THEMES - INTERNAL	BRIEF DESCRIPTION
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

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 approved in Spring 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
- Have Metro leaders and managers take a more in-depth diversity training, such as Uniting 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 and 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 Metro's Research 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, ticket 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 more welcoming
- 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 which individuals, groups or communities will benefit from this policy/procedure/program/service/investment/decision.</p> <p>6. Identify which 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"> • Who will make the ultimate decision? • Who will be consulted about the decision? • Who could be missing in the decision-making process? And how can they be included in it? | <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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Brian Evans

STAFF REPORT

IN CONSIDERATION OF RESOLUTION NO. 16-4708, FOR THE PURPOSE OF APPROVING THE STRATEGIC PLAN TO ADVANCE RACIAL EQUITY, DIVERSITY AND INCLUSION

Date: June 16, 2016

Prepared by: Juan Carlos Ocaña-Chiu
Equity Strategy Program Manager, 503-797-
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BACKGROUND

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. The data research for which Metro is known shows that, 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.

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.

Our current and future diversity will help the region develop and maintain sustainable economic growth if we proactively advance equity. Research shows that regions that attain more economic growth are those with greater racial inclusion and smaller racial income gaps.

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. It's not only the right thing to do; it's the smart way to improve our present and plan for our future.

Since 2012, Metro staff, in collaboration with a diverse array of community partners and with direction from the Metro Council, have been developing an equity strategy to help ensure that Metro achieves equitable outcomes through its programs, policies, services and facilities. The final Strategic Plan to Advance Racial Equity, Diversity and Inclusion is attached as Exhibit A.

About the Equity Strategy Program

In 2010, the Metro Council and regional partners adopted equity as one of the region's six desired outcomes. In 2011, Metro staff completed a work plan and launched the equity strategy program; in 2012, conducted an inventory of Metro programs related to equity; and in 2013 created the Equity Strategy Advisory Committee (ESAC) to provide recommendations and oversight.

The Equity Strategy Program was created to identify the opportunities for long-term policy discussions in areas where Metro is one of the regional actors, and the opportunities for short- and mid-term action to advance equity on program areas that Metro controls. The program was also asked to guide the implementation of an actionable and measurable equity strategy.

The program goals are to:

- Establish an agency-wide definition of “equity” to create a shared understanding.
- Establish an equity framework containing recommended measures of existing inequities and disparities in the region, and how communities and people in the region experience the six desired regional outcomes.
- Create meaningful engagement with local communities and jurisdictional partners and capacity-building opportunities for communities most impacted by disproportionate burdens to partner with Metro in the design of the Strategic Plan
- Define Metro’s role and authority in advancing equity across the region’s desired outcomes as well as identify the institutional systems that stand in the way of equitable outcomes throughout the agency.
- Build institutional capacity inside Metro to understand, adopt and practice equity in its policies, programs and services.
- Develop and implement a Metro-specific Strategic Plan that is actionable and measurable.

Given the scale of effort needed to strategically move Metro’s equity work forward, staff designed a two-phased approach to developing an equity framework for Metro.

Phase 1 | Equity Inventory Report (completed)

The Equity Inventory Report completed in 2012 provided a snapshot of initiatives, programs and activities across the agency that have equity goals.

The report identified four areas for improvement:

1. Lack of strategic guidance to support intentional efforts to advance equity
2. Duplication of effort in the area of equity
3. Inconsistency of approach to equity considerations
4. Lack of capacity throughout the agency to advance regional outcomes

Based upon the conclusions of the Phase 1 inventory work, Council approved the Phase 2 work program to design an equity strategy while continuing to support coordination of on-going programmatic efforts.

Phase 2 | Equity Strategy Development (in progress)

Phase 2 work includes:

Equity definition (completed): Metro created a working definition of equity, developed by ESAC and reviewed by Council on March 13, 2014, that is being used across the agency.

Equity Technical Workgroup (completed): In October 2013, Metro contracted with six community-based organizations (CBOs) and Portland State University’s Institute of Metropolitan Studies to develop a baseline to understand and measure Metro’s equity-related activities. The six community-based organizations that served on the technical workgroup were 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 scope of work evolved over time and in January 2015 the CBOs delivered the “Equity Baseline Report: A Framework for Regional Equity”. Instead of a detailed set of data points to measure equity, the report included the definition of 10 equity indicator categories and two other organizing principles for Metro to understand and measure equity from the community’s perspective. The report was presented to ESAC, who prepared their own recommendations to Martha Bennett, Metro Chief Operating (COO) Officer.

COO Direction: Based on the equity framework report and ESAC recommendations, Martha Bennett, Metro's COO, provided direction to Metro staff to guide them in developing the draft Strategic Plan for Council consideration:

- Recommend that Metro's regional partners, its Council and the appropriate staff explore the reframing of the six desired regional outcomes to explicitly include social equity in the outcomes. This work needs to happen separately from the equity strategy and action plan development.
- Adopt the 10-indicators framework as an organizing principle for Metro to understand equity in the region, beyond Metro's programs and services. At the same time, Metro does not intend to develop programs and services in all 10 indicator categories.
- Create the strategy to advance equity in the region in specific policy areas, with significant discussion with all regional partners. This includes identifying the policy areas for long-term discussion, and potentially the questions to frame the discussion. The equity strategy will not include the results of the regional discussions, but rather set the methodology and the stage for the discussions.
- Create an action plan to provide a unified approach to advancing equity in Metro's program areas. The action plan will focus on short- and mid-term outcomes.
- Develop decision-making tools in the equity strategy and action plan, including an equity lens and a disparate impact analysis methodology.
- Build the plan using external and internal stakeholder engagement

Final draft Strategic Plan development (in progress): Beginning in spring, 2015 Metro 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 to elicit feedback into critical regional equity issues and potential roles for Metro to help advance equity through the Portland metropolitan region. 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.

On July 31, 2015, Metro Council held a retreat dedicated to discussing the progress made in the creation of the equity strategy. Council also discussed staff's proposal to focus Metro's approach on advancing racial equity. The original recommendation from both the CBOs and ESAC was for Metro to create a strategy to address both racial and income equity. However, research on equity work by jurisdictions at the national level showed that racial equity is emerging as the most promising way to have a greater impact on equity for all traditionally marginalized communities. At the retreat Metro Council agreed that the agency's equity strategy should center on racial equity, but demonstrate that it will benefit all communities in the region.

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.

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, and they 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.

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.

Moving into Implementation: Pending Council approval of the Strategic Plan, Metro staff has started to lay the groundwork for its implementation. Based on community, staff and Council input, the priority and foundational action items in each of the five Strategic Plan goals have been scheduled for implementation in Fiscal Years 2016-17 and 2017-18. Staff has compiled budget information that reflects both the investments already committed by Metro to implement the Strategic Plan action items in FY 2016-17, and the range of additional investments that will be needed. This investment will ensure that the Strategic Plan is implemented with a robust evaluation framework and the tools and training that will help Metro staff to successfully advance racial equity, diversity and inclusion.

Metro is aware that people in the region are paying close attention to the agency's equity work. Communities of color have expressed their priorities for implementation and for how Metro should conduct this body of work: with a renewed sense of urgency, greater transparency, and a commitment for ongoing community participation. Metro looks forward to moving into implementation in a deliberate and decisive manner.

ANALYSIS/INFORMATION

1. **Known Opposition:** There is no organized known opposition to the approval of the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. During the public comment and community engagement activities conducted by staff, the majority of the input has been in support of the document.
2. **Legal Antecedents:** Metro Council adopted the Diversity Action Plan in 2012 (Resolution No. 12-4375), which supports and complements the Strategic Plan. The City of Portland adopted a set of citywide racial equity goals and strategies to guide its policies, plans and procedures in 2015 (Resolution No. 37144).

3. **Anticipated Effects:** If this legislation is adopted, Metro will implement the goals, objectives and actions included in the Strategic Plan. Implementation will result in Metro improving conditions for communities of color throughout the region and providing support to local jurisdictions and stakeholders interested in working on advancing racial equity, diversity and inclusion.
4. **Budget Impacts:** The majority of actions proposed to be implemented in the first year, following approval of the Strategic Plan, have funding included in the Proposed Budget for Fiscal Year 2016-17. However, there are some action items are not currently funded. For those staff will prepare and submit a request for additional funds through the usual budget amendment cycles in the coming year.

RECOMMENDED ACTION

Metro staff recommend that the Metro Council, by Resolution No. 16-4708, support the goals, objectives and actions items outlined in Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion, attached as Exhibit A, and approve the Strategic Plan.



Metro | Memo

Date: Monday, June 6, 2016
To: Metro Council members
From: Martha Bennett, Metro Chief Operating Officer
Subject: Recommendation to approve the Strategic Plan to Advance Racial Equity, Diversity and Inclusion
Cc: Carl Talton, Equity Strategy Advisory Committee Chair; DEI Program staff

I am pleased to transmit the final draft of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion (Strategic Plan) for your consideration.

This Strategic Plan is the product of a multi-year process that Metro Council began in 2010 by adopting the six desired regional outcomes, which included equity. To better understand how well we were doing as an agency, staff completed the Metro Equity Inventory Report in 2012. The inventory found Metro departments and venues were implementing a number of important equity-related programs and services, but these efforts lacked a unified, strategic direction. After discussing the Inventory's findings, the Metro Council launched the Equity Strategy project in the fall of 2012, directing the Chief Operating Officer to develop a draft strategy and action plan to bring focus to Metro's work. This draft Strategic Plan is the culmination of that Council-directed work.

In 2013, I appointed an Equity Strategy Advisory Committee (ESAC) to provide guidance, input, and community perspective to this work. ESAC is made up of community leaders from the non-profit, philanthropy, government and business sectors. One of the earliest products of ESAC's work was a working definition of equity – proposed by ESAC in February 2014 and adopted by Council in March 2014 – and this definition framed the development of the Strategic Plan

Also in 2013, six community-based organizations were selected to create a baseline to understand and measure Metro's equity work. In January 2015, the six organizations delivered the "Equity Baseline Report: A Framework for Regional Equity," which outlined the ten dimensions that every person needs to experience true equity. ESAC recommended that the strategy incorporate elements of the Framework, and I gave direction to staff that was based on those recommendations in April 2015.

With these recommendations and direction as a foundation, Metro staff developed the draft Strategic Plan using a multi-pronged, inclusive engagement and research approach. This twelve-month effort involved:

1. Extensive collaboration with local elected officials, government staff, and business and philanthropy leaders throughout the Portland region.
2. Three rounds of community discussions with culturally specific community-based organizations.
3. An agency-wide internal assessment and staff engagement process.
4. A cross-departmental, coordinated public input process.

5. A partnership with national and regional equity experts to uncover best practices and research to inform the plan.

Together, these extensive engagement and research efforts have shaped a strategy that will position Metro to equitably and more effectively serve all communities in the region.

In considering this draft Strategic Plan, a few themes stand out that I offer for your consideration as part of Council deliberations.

1. **Racial Equity:** In July 2015, Council directed staff to focus on eliminating the barriers that confront people of color of our region as part of this strategy. In providing this direction, Council recognized communities of color in our region face the most pervasive barriers in all areas of social well being. Many of the same barriers are shared by other groups such as the LGBTQ community, people with low incomes, young people, seniors, women and individuals with disabilities. At the same time, research shows that by addressing the most widespread barriers that keep communities of color from thriving, Metro will be addressing many of those same barriers that affect other marginalized groups.

Additionally, national, regional and local equity research reveals that regions that intentionally focus on improving economic, social, and civic outcomes for communities of color are more successful overall. In other words, everyone benefits in regions that reduce racial disparities. In Metro's case, we will better achieve all of the six desired regional outcomes for all of the region's people by focusing on communities of color. Moreover, the region's population is increasingly diverse, with communities of color representing an increasing share of our growing population. Including people of color in our decision making, in our workforce, and in our business relationships will make Metro more effective.

2. **Department-specific plans:** One considerable action item listed within the Strategic Plan is for each Metro department and venue to develop its own equity action plan in partnership with community. Directors and staff within each of Metro's departments are best positioned to identify actions within their programs, projects, services and plans. Guided by this Strategic Plan, department-specific plans will bring Metro programs into alignment with the Council's strategic focus. In the coming year, the Parks & Nature, Planning & Development, Property & Environmental Services departments and the Oregon Zoo will begin this work, in partnership with Council, DEI staff, and the community.
3. **Participatory evaluation:** I agree with the priority identified in the Strategic Plan to continuously assess and improve upon Metro's efforts to advance equity in the region. The use of performance measures and feedback loops is important to understanding impact and effectiveness. Additionally, the participatory design of the evaluation approach positions Metro to be a better community partner and increases its level of accountability to the public.

4. **Implementation tools:** The Strategic Plan provides a foundational set of tools that will assist staff in implementing the identified actions and advancing equity within their everyday work. In addition to tangible tools, such as the racial equity guidance questionnaire, the definitions and explanation within the Strategic Plan provide the building blocks that allow Metro staff to better understand racial equity and the language to begin the dialogue to advance this practice.
5. **Advisory Committee:** The Strategic Plan recommends that the Metro Council appoint new advisory committee to provide community oversight and guidance in the implementation of the Strategic Plan to Advance Racial Equity, Diversity and Inclusion. I recommend that the Council direct staff to proceed with this step immediately as a key component of community engagement and accountability.
6. **Co-Creation:** From my perspective, one of the key recommendations of this Strategic Plan is for Metro to continue to evolve the co-creation of programs and plans with communities of color. As Council is aware, Metro departments have been piloting this approach with programs that range from our Partners In Nature grants to public outreach on the Powell-Division Corridor project. The Strategic Plan recommends that we continue to partner with a diverse range of community-based organizations. The goal of this approach is to build capacity within Metro and the community and to ensure that our projects and programs meet the needs of specific communities in our region

Addressing the large disparities in our region requires bold action and Metro is taking a bold leadership step by adopting this plan. The process to implement the Strategic Plan will be complex and I fully expect that Metro staff and leadership will make mistakes as we take new risks in our effort to advance equity. I also know that because of Metro's long tradition of innovation we will learn from these mistakes, which will strengthen our work and improve the results. This work is unique to jurisdictions throughout the nation and I am certain that it will make Metro and our region economically, environmentally, and civically resilient.

Before I conclude, I want to recognize the herculean efforts of Metro's Diversity, Equity, and Inclusion team: Patty Unfred, Juan Carlos Ocaña-Chíu, Cassie Salinas, Nyla Moore, Scotty Ellis, Bill Tolbert, Amy Croover, and past staffers Nuin-Tara Key, Pietro Ferrari, and Pam Phan. In addition, the leadership of Carl Talton and the current and past members of the Equity Strategy Advisory Committee has been essential to the success of this work.

I look forward to the Council's deliberations on this Strategic Plan and to moving into implementation.



Metro | Memo

Date: Monday, May 16, 2016
To: Martha Bennett, Metro Chief Operating Officer
From: Equity Strategy Advisory Committee
Subject: Comments and recommendations on Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion
Cc: Scott Robinson, Metro Deputy Chief Operating Officer, and DEI Program Staff

The Equity Strategy Advisory Committee (ESAC) members have had the opportunity to review the final draft of Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion ("Strategic Plan"). ESAC members appreciate the work and thoughtful consideration that staff and community members put into creating the final draft of the Strategic Plan.

We strongly support the content of the Strategic Plan, including:

- The racial equity approach. Metro makes a powerful statement by leading with race and focusing its equity work on removing the barriers that affect people of color and improving equitable outcomes for these communities. The racial equity approach also brings Metro into a growing national movement of jurisdictions that are embracing racial equity as the way to be more effective in serving all communities.
- The internal and external focus. The Strategic Plan's goals, objectives and actions focus on both Metro's central services and on the agency's role in the region to provide leadership to advance racial equity. This dual internal and external focus of the document is crucial.
- The comprehensive nature of the Strategic Plan. This document stands out because of the breadth of its scope, from articulating an equitable vision for Metro, to identifying five long-term goals with their objectives and actions, to creating an implementation and evaluation framework and tools, to making a credible case for taking the racial equity approach. Metro should be recognized for creating this uniquely comprehensive and forward-looking document to advance racial equity.

We also support the following elements of the process to create the Strategic Plan:

- The extent of community engagement. Metro involved a significant number of community members and leaders in the creation of the Strategic Plan including ESAC members and stakeholders from a number of sectors. Metro also benefited from the participation of subject-matter experts in the creation of this Strategic Plan including staff from local community-based organizations and consultants from around the region and at the national level. Their contributions have greatly strengthened this Strategic Plan. Meaningful partnership should continue in the implementation phase.
- The foundations for the Strategic Plan. Metro has built the document on the foundations laid by the agency's Diversity Action Plan and by its public participation and inclusion efforts. Instead of superseding these existing efforts, the Strategic Plan demonstrates how the agency will coordinate its racial equity work with the efforts to serve all the other historically marginalized communities.

At the same time, ESAC members have identified areas for Metro to improve on in order to be successful in the implementation of the Strategic Plan:

- Accountability. Metro needs to create greater transparency around its work in order to show what progress the agency makes. Community participation and accountability in the implementation of the Strategic Plan will be extremely important. Metro needs to partner with the community to provide open access to information. This will allow the community to evaluate Metro's success, and also to celebrate the agency's progress toward achieving its crucial racial equity goals and objectives.
- Sense of urgency. Metro needs to demonstrate a greater sense of urgency in the implementation of the Strategic Plan and all other actions to advance equity. The agency needs to act swiftly and decisively when implementing this Strategic Plan to address the needs of communities who are experiencing significant disparities today. Setting and evaluating goals and actions will demonstrate this sense of urgency, and will also increase accountability. Sense of urgency and accountability are directly related.
- Regional leadership. Metro is in a position of leadership in the region, and it has a great deal of influence, so the agency needs to leverage these to advance racial equity region-wide. Metro needs to work more closely with partner jurisdictions to make sure that this Strategic Plan is relevant to them. Metro elected officials and leadership need to tell the Metro equity story and encourage their peers to create their own stories.
- Determination. Metro needs to take bold initiatives to advance racial equity. At the same time, the agency needs to recognize that making mistakes is an integral part of being successful in this journey. Metro needs to learn from those mistakes, share the learnings, and be inspired to stay the course toward greater racial equity.

Recommendations:

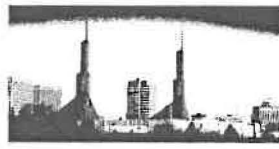
Based on its members' review of the final draft of the Strategic Plan to Advance Racial Equity, Diversity and Inclusion, the Equity Strategy Advisory Committee recommends that:

1. Martha Bennett, Metro Chief Operating Officer, forward the final version of the Strategic Plan to the Metro Council for their consideration and adoption, and
2. Metro create a new advisory committee, appointed by the Metro Council, to provide community oversight and guidance in the implementation of the Strategic Plan. This new advisory committee should be representative of the diversity of the region, and receive support from Metro to be effective and visible.

Metro's Chief Operating Officer has clearly shown total commitment to the development of the equity strategy. ESAC also recommends that going forward this commitment be expressed through thoughtful and passionate leadership when Metro staff begin the implementation of the Strategic Plan. By demonstrating willingness to increase the agency's accountability, sense of urgency, regional leadership and determination to advance racial equity, Metro and its partners will make the Portland metropolitan region a truly great place for all communities.

Sincerely,

Carl Talton
ESAC Chair



600 NE Grand Ave.
Portland, OR 97232
503-797-1780

www.oregonmetro.gov

Attachment 3



Metro | *Exposition Recreation Commission*

June 15, 2016

Dear Council President Hughes and Metro Council:

The Metropolitan Exposition and Recreation Commission (MERC) is pleased to support Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion ("Strategic Plan"). The Commission has had the opportunity to review the content of the Strategic Plan and was impressed with both its breadth and depth. We believe that this document charts a crucial new path for Metro to become a better public agency for the benefit of all communities in the Portland metropolitan region.

The Strategic Plan presents a compelling case for Metro to use a racial equity approach in order to make sure that traditionally marginalized communities, especially people of color, are more effectively served by the agency. The Portland metropolitan region, like the rest of the country, is experiencing rapid demographic change. Communities of color are the fastest growing in the region, and they also continue to experience great disparities in all aspects of social well-being, as compared with the white majority community.

By proposing that Metro work on five long-term goals to remove barriers to success and achieve more equitable outcomes for communities of color, the Strategic Plan presents a series of realistic and ambitious objectives and action items. These goals, objectives and actions, together with a robust evaluation framework and a decision-support tool, will help leadership and staff to incorporate racial equity into all aspects of Metro's work. But, we note with concern that many of the goals, while recognizing limited resources, limit the action items to working with existing resources. MERC urges the Metro Council to commit to allocating sufficient resources (including new resources as needed) to allow more effective and efficient work towards the Strategic Plan Goals.

For example, an objective under the goals of engaging communities of color and allocating resources in a way that advances racial equity requires conducting user testing to improve accessibility and usability of digital tools to increase involvement – but not until after FY 2017-18. MERC has repeatedly expressed concern that the increasing societal focus on digital technology may mean reaching more people in the majority community at the expense of further disenfranchising communities of color who may not have computers in their home, high speed internet access, or otherwise be digitally proficient. MERC supports an allocation of new resources that allows such research to be conducted sooner, and that would fund effective outreach and engagement to communities of color, whether that be through investments in community organizations or additional Metro staff.

The aggressive approach taken by Metro staff to ensure meaningful participation by communities of color in the creation of the Strategic Plan paid off in creating a thorough and thoughtful plan. The Commission appreciates the multiple updates and opportunities to provide feedback that we have received throughout the creation of the Strategic Plan. And we are pleased to see that the Strategic Plan implementation and evaluation continue to include significant community participation and oversight.

For these reasons, the Metropolitan Exposition and Recreation Commission wishes to express its strong support for Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion and urges Metro Council to adopt and implement it.

Sincerely,



Elisa Dozono
Chair, Metropolitan Exposition and Recreation Commission

cc: MERC Commissioners
Martha Bennett
Metro Diversity, Equity and Inclusion Staff



June 8, 2016

Tom Hughes
Metro Council President
600 NE Grand Ave.
Portland, Oregon 97232

Dear Council President Hughes:

The Metro Policy Advisory Committee ("MPAC") wants to express its support for Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion ("Strategic Plan") and urges the Metro Council to approve it and begin implementing it. As representatives from jurisdictions and community organizations, MPAC members are committed to achieving greater equity, and the Strategic Plan is an important step in this direction.

The Strategic Plan shows that the Portland metropolitan region is undergoing significant demographic change, with people of color becoming a greater percentage of the local population while, at the same time, experiencing great challenges in many areas. The Strategic Plan makes the case for why advancing racial equity is important for the region: both for ensuring that all communities are effectively served by government, and for achieving greater economic prosperity.

The Strategic Plan also provides a clear rationale for why focusing on advancing racial equity will contribute to improve equitable outcomes for all communities that have been historically marginalized. It also provides ambitious and achievable goals, objectives and action items to ensure that Metro improves how it conducts employment, contracting, engagement and service delivery. The Committee appreciates the significant amount of community and stakeholder engagement that has gone into creating the Strategic Plan, and it commends Metro for ensuring that this initiative will be implemented with strong community participation and oversight.

The Strategic Plan calls for Metro to continue to partner with other jurisdictions and stakeholders in order to find ways to advance racial equity as a region. The Committee is excited about the opportunities that this regional conversation will bring, and it looks forward to actively participating in this dialogue.

Sincerely,

Tim Clark
Chair, Metro Policy Advisory Committee



Metro

Strategic plan to advance racial equity, diversity and inclusion
Executive summary



Metro is committed to working together with people, businesses, nonprofit organizations and public partners to create a Portland region where:

- All individuals and communities benefit from a strong economy with quality, living-wage jobs, stable and affordable housing, safe and reliable transportation, and a healthy environment with clean air and water.
- Racial equity is recognized as the backbone of good governance. To ensure the success of everyone, we must work together to end inequities that affect historically marginalized communities. We must remove barriers so that everyone can realize their full potential and contribute to and participate in our collective community and economy.
- Our public structures, institutions and processes address social and economic disparities for people of color. Those disparities are rooted in a history of discriminatory laws, policies and practices.
- Diversity is celebrated and all communities meaningfully participate in public decision-making.

The strategy

Metro will build upon and strengthen its ongoing equity work by implementing interrelated strategies to create long-term institutional, structural and cultural change:

Lead with racial equity 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 public spaces.

Broaden the impact Addressing the disparities that affect the most marginalized to generate solutions that address the needs of all other historically marginalized groups.

Generate support to create real and lasting cultural change Building a structure for Metro leaders, staff and region partners including community to engage in conversations about race, make concrete and measurable institutional changes and create a foundation for on-going reflection and needed change within the organization and Portland region.

Partner with communities of color Ensuring that members of these communities are involved in Metro's equity efforts to create greater trust and accountability.

Measure progress Measuring and recognizing milestones and improvements to increase and maintain momentum along the route to greater racial equity and change.



Why racial equity?

The Portland metropolitan area's population is growing and changing. Like most of the nation, our cities and counties are becoming more diverse. It is projected that by the year 2045, people of color will be the majority in the United States.

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

Unfortunately, most communities of color in the Portland area 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 cities and counties, schools, community and philanthropic organizations, and businesses are taking a long, hard look at equity. It's not only the right thing to do; it's the smart way to improve our present and plan for our future.

There is no need to choose between equity and economic growth. Equity and community diversity positively impact the larger economy and have become the superior economic growth model across the country.

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

Organizational goals, objectives and actions

This strategic plan is built around five long-term goals. The goals are deliberate guideposts that direct Metro in creating specific objectives, actions and measures of evaluation and accountability as the agency works to help the Portland area reach its equitable and prosperous destination.

The proposed actions are centered on those that the entire agency can do to advance racial equity, diversity and inclusion. A major deliverable of this strategic plan is for each Metro department and venue to develop its own equity action plan specific to their programs, policies and services within 24 months of the adoption of this strategic plan.

The strategic plan will also work together with the Diversity Action Plan to increase the effectiveness of Metro's diversity, equity and inclusion work. Building on the foundation created by the Diversity Action Plan, the Strategic Plan will provide Metro leadership and staff additional tools and authority to make change.

Equity and Equality

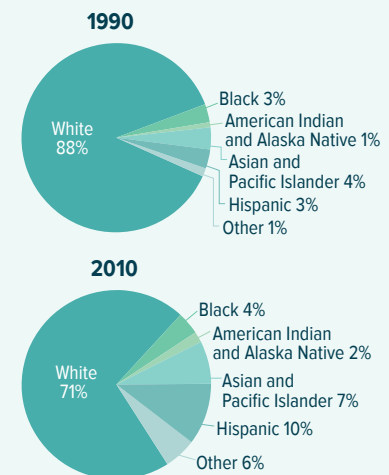
Not everyone needs glasses to see. But those that do require a specific prescription to enable them to see. Some people are severely visually impaired or are blind.

Equality: Believing that everyone should get the same glasses regardless of their specific need.

Equity: Understanding that some have greater visual difficulties than others, therefore only those that need glasses get them and each prescription fits that person's specific needs. Some people are blind, so they need entirely different solutions to perceive things that seeing people experience through sight.

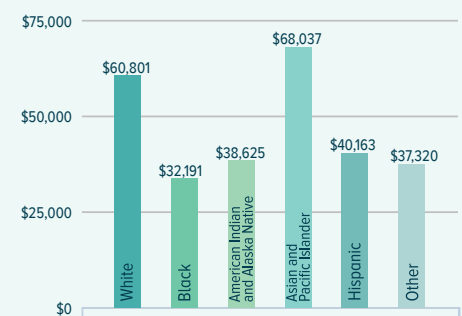
The region is diversifying ...

PERCENT OF POPULATION BY RACE/ETHNICITY
Tri-county region. Source: US Census, 1990, 2010 SF1-QTP6



... but regional inequities persist.

MEDIAN HOUSEHOLD INCOME, BY RACE/ETHNICITY
Portland MSA, 2011-2013. Source: US Census, American Community Survey three-year estimates





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.

METRO COUNCIL PRESIDENT

Tom Hughes

METRO COUNCILORS

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

AUDITOR

Brian Evans

To learn more visit
oregonmetro.gov/equity

Five Strategic Goals

The five long-term strategic goals identified in this plan are:

A. Metro convenes and supports regional partners to advance racial equity.

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.

B. Metro meaningfully engages communities of color.

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 the Metro decisions and programs that impact their lives. Metro commits to co-creating with the community, learning from the collective wisdom and building the capacity of community leaders.

C. Metro hires, trains and promotes a racially diverse workforce.

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.

D. Metro creates safe and welcoming services, programs and destinations.

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.

E. Metro's resource allocation advances racial equity.

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