



600 NE Grand Ave.  
Portland, OR 97232-2736

## Council work session agenda

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Thursday, February 27, 2020

2:00 PM

Metro Regional Center, Council Chamber

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**2:00 Call to Order and Roll Call**

**2:05 Safety Briefing**

**Work Session Topics:**

2:10 FY19-20 Budget Note Report Back: DEI [20-5363](#)

Presenter(s): Raahi Reddy, Metro

Attachments: [Work Session Worksheet](#)  
[Exhibit A to Work Session Worksheet](#)  
[Exhibit B to Work Session Worksheet](#)  
[PPT: DEI Budget Note Report Back](#)

2:40 FY2021 Budget Discussion: Department Budget - Support Services [20-5373](#)

Presenter(s): Heidi Rahn, Metro

Attachments: [Work Session Worksheet](#)  
[PPT: Support Services FY21 Budget](#)

3:40 Regional Investment Strategy Update [20-5364](#)

Presenter(s): Andy Shaw, Metro  
Margi Bradway, Metro

Attachments: [Work Session Worksheet](#)  
[PPT: Transportation Funding Measure Update](#)

**4:40 Chief Operating Officer Communication**

**4:45 Councilor Communication**

**4:50 Adjourn**

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬស្នើសុំទទួលបានកម្មប្រព័ន្ធរើសអើងសូមចូលទស្សនាគេហទំព័រ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំស្នើសុំអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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**FY19-20 Budget Note Report Back: DEI**

*Work Session Topics*

Metro Council Work Session  
Thursday, February 27, 2020  
Metro Regional Center, Council Chamber

COMMUNITY CAPACITY TO SUPPORT RACIAL EQUITY  
BUDGET NOTE RESPONSE

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Date: 2/18/2020  
Department: COO & DEI  
Meeting Date: 2/27/2020

Prepared and presented by:  
Raahi Reddy x1685  
Length: 30 min

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**ISSUE STATEMENT**

Staff is reporting back to Council in response to the *Agency-wide community capacity support to advance racial equity* FY20 budget note introduced by Councilor Chase. The budget note directed the COO to propose an agency-wide program that would:

- leverage and expand upon existing agency-wide community partnerships to support community capacity building efforts;
- develop long term strategic partnerships in progressing Metro's work to advance racial equity in greater Portland;
- address increased demand on community partners in supporting Metro on its regional initiatives;
- foster sustained community-based capacity to strengthen their ability to advocate for racial equity in Metro programs, policies and practices.

**ACTION REQUESTED**

Staff is sharing program options and cost estimates for consideration in the FY20-21 budget.

**IDENTIFIED POLICY OUTCOMES**

The proposed capacity building pilot program, co-created by Metro staff and community partners, would support civic and community engagement capacity among community-based organizations (CBOs) who serve communities of color. This program would address the increasing demand Metro is placing on CBO partners and would strengthen coalition building so together we can deliver on Metro's region-wide efforts to advance livability and racial equity, including Metro's:

- Strategic Plan to Advance Racial Equity, Diversity, and Inclusion
- Regional Waste Plan
- Regional Transportation Plan
- Parks and Nature System Plan
- Housing Bond
- Parks and Nature Bond

**POLICY QUESTIONS**

- Should Metro implement a pilot community capacity building for racial equity program?
- Does the program outlined here meet Council's expectations and desired outcomes?
- Are there particular outcomes Council would prioritize?
- If interested, what level of investment would Council direct the COO to pursue?
- Is there any additional information Council would like to receive?

## **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

**The challenge** - Metro has been rapidly expanding and deepening its work with CBO partners, as directed by Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion. These increasing requests for partnership are outstripping CBOs' ability to engage with us because of the demand for their time and, more significantly, the expertise of these organizations' leadership, staff and members. Furthermore, current models of partnership and engagement –often short term, project-based and narrowly focused – do not necessarily address the longer term demand for these organizations' capacity needs. While they are important to advancing mutual interests, they are unable to fully build long-term trust and relationships, support leadership development, or provide the technical and topic-specific education needed, all of which are necessary bedrocks of meaningful community engagement and civic participation. Many areas of the region – Clackamas, Washington and East Multnomah counties in particular – lack stable funding required to sustain the civic engagement infrastructure Metro requires to advance racial equity.

**The proposed solution** - The Program Design Committee recommends that Metro implement the capacity building program proposed in Exhibit A to meet the challenges outlined above. The objectives of this program would include:

- Strategically support CBOs in developing and sustaining civic and community engagement capacity for Black, Indigenous, and other communities of color to meaningfully inform and impact Metro's policy and financial decisions;
- Create a vehicle for strategic investment in community capacity in geographic areas and topic areas of interest in anticipation of expanding needs or emerging priorities;
- Support, through coordination and facilitation, ongoing changes to Metro systems and processes that build trust and reduce harm in its relationships with Black, Indigenous, and other communities of color;
- Support agency-wide best practice sharing, relationship management and deeper integration of community partnership and engagement outcomes into Metro decision-making to maximize the impact of existing partnership work;
- Support Metro advisory and oversight committee recruitment and advance the diversification of these committees through intentional training and recruitment in communities of color across the tri-county region, in partnership with community-based organizations.

**Program design** - The Program Design Committee recommends using three program elements to meet these objectives. They are, in order of priority:

1. Flexible capacity building grants: Three-year grants to CBOs serving communities of color to support capacity for civic and community engagement.
2. Program resources: Resources to be used by the grant cohort to meet shared needs – could include training and professional development, convening to share best practices and strengthen coalitions, technical support, etc.
3. Direct department support: support provided by Metro's departments and visitor venues that advance the knowledge and skills of the grant cohort and their organizations. - could include services such as topic education or technical assistance, GIS support or access to data, etc.

**Staff-generated program options**

	Program elements	Details	Ongoing annual cost
Option 1: Grants only	Grants	5 partnerships	\$500,000
Option 2: Grants plus program resources	Grants + program resources	5 partnerships and \$100,000 in program resources	\$600,000
Option 3: High-investment	Grants + program resources	7 partnerships and \$100,000 in program resources	\$800,000

**Rationale**

Option 3: High investment

This option sends a strong signal to Metro’s community, government and philanthropic partners that Metro will continue its leadership in advancing racial equity in the region through partnership with community-based organizations who serve communities of color. This option allows for a wider array of partnerships across Metro’s topic areas and geographic areas of interest. It also supports the cohort by providing program resources intended to fill collective needs of grantees and create spaces to share learning and advance knowledge and skills in Metro topic areas. Community partners involved in developing this program expressed strong desire for program resources to support a cohort of grantees.

- Pro: Maximizes impact across geographic areas, topic areas and racial/ethnic groups.
- Con: Places a higher financial burden on Metro.

Option 2: Grants plus program resources

The need for capacity building is significant and urgent, especially as Metro ramps up investments through its regional investment strategies. The Program Design Committee recommends a minimum annual investment of \$500,000 across five partnerships to address this need. A minimum cohort of five CBO partners also adds value to the program through best-practice and knowledge sharing across organizations. This option includes a smaller number of grants than Option 3, but should enable Metro to test the efficacy of the program for building community capacity across multiple communities, geographies and topic areas of interest. It also retains program resources to support the cohort of grantees.

- Pro: Program resources maximize the value of convening a grant cohort.
- Con: Increased costs to Metro.

Option 1: Grants only

This option removes the program resources, focusing solely on capacity building grants, but retains the minimum investment of \$500,000 across five partnerships.

- Pro: Achieves core objectives of the program and supports strategic geographic investments across the region.
- Con: Reduces Metro’s ability to build knowledge around key areas of interest and does not support shared learning across our partners through the cohort model.

## **PROGRAM DESIGN COMMITTEE RECOMMENDATIONS**

The Program Design Committee recommends Metro Council invest in a community capacity building program for racial equity to meet urgent needs of Metro's CBO partners and invest in the long-term success of our initiatives. The Committee also sees value in allocating program resources to complement capacity building grants in order to support shared learning and coalition-building. Staff-proposed options 2 and 3 meet these criteria, while option 3 best addresses the urgency and scale of the problem articulated by the Committee.

A variety of reasons suggest the program is best implemented at scale rather than in smaller increments. First, for Metro to see outcomes across geographic areas of highest need – Clackamas, Washington and East Multnomah counties - and across many of its topic areas of interest, more than a few grants are required. Furthermore, the amount of resources, time and energy needed to develop this program with community partners, and the staff time necessary to administer the program, only make sense if more than a few community-based organizations can benefit.

The Program Design Committee also recommends assigning one FTE to this program to support not only continued program design, administration and improvement, but also Metro-wide (1) relationship management and community engagement coordination, (2) advisory and oversight committee recruitment and (3) best-practice sharing to maximize benefit and reduce harm.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

### **Landscape of existing partnership work**

Metro works with community-based organizations who serve communities of color in a variety of ways and with a diverse array goals. With a few exceptions, this work is short-term (a year or less), task-specific and revolves around specific project deliverables. This is often the right type of work to meet Metro's immediate needs and generate our desired outcomes. However, the nature of this work makes it difficult for community partners to build long-term capacity and relationships in the communities they serve, which in turn, jeopardizes their ability to deliver quality outcomes and Metro's ability to meet its commitments. This capacity building program would support Metro's existing investments in community partnerships by adding capacity for community partners so they can more effectively meet our shared needs and achieve our shared vision for equity in the region.

### **Regional collaboration**

The program being proposed reflects a growing consensus among Metro's public sector and philanthropic peers that building capacity for civic engagement in communities of color should be a priority. Metro's DEI team has been in conversations since the fall of 2019 with City of Portland's Office of Civic Life, Meyer Memorial Trust, NW Health Foundation and North Star Civic Foundation about impacts of a this type of work region-wide and what future collaboration could look like. The DEI team is also in talks with other jurisdictions, including Washington County who approved of \$250,000 for community capacity building funding for racial equity in their FY20/21 budget.

**Anticipated effects**

- Trust built with communities of color across the region
- Stronger long-term partnerships with critical community partners,
- Community partners better able to meet Metro’s increasing and evolving needs
- Communities of color more meaningfully included in Metro processes
- Stronger community networks and capacity in geographic areas of interest (in particular, Clackamas, Washington and East Multnomah counties)
- More robust capacity for CBOs and the communities they serve to engage around Metro priority issues (e.g. waste reduction, transportation planning, or access to nature)
- More racial, ethnic and geographic diversity on Metro advisory and oversight committees
- More community leaders serving on advisory and oversight committees and in leadership roles

**Financial implications**

Metro staff suggest that the resources for program implementation come from the following sources, recognizing this program’s agency-wide benefit:

- \$250,000/yr. in ongoing M&S from WPES and Parks & Nature
- \$250,000/yr. (Option 1) – \$550,000/yr. (Option 3) in ongoing M&S from Metro’s general fund (which could include existing funds from the Office of the COO, DEI, Communications and Visitor Venues).

**BACKGROUND**

Metro’s DEI team convened a Program Design Committee comprised of culturally-specific community-based organizations and Metro staff from across the agency to co-create this budget note response. This committee met three times for facilitated half-day workshops to define potential objectives and components of a program. Metro leadership and staff from Parks and Nature, Waste Prevention and Environmental Services, Planning and Development, Communications, DEI, GAPD, the Office of the COO and the Council Office participated.

Community-based organizations with staff on the Program Design Committee include:

- |  |  |
|--|--|
| • Adelante Mujeres                                 | • OPAL Environmental Justice                             |
| • Asian Pacific American Network of Oregon (APANO) | • The Portland African American Leadership Forum (PAALF) |
| • Basic Rights Oregon                              | • Unite Oregon   |
| • Centro Cultural de Washington County             | • Verde  |
| • Coalition of Communities of Color                | • Vision Action Network                                  |
| • Latino Network                                   |  |

**ATTACHMENTS**

Exhibit A: Budget Note Response Form

Exhibit B: Letter of Support from Program Design Committee Co-chairs

- Is legislation required for Council action?  Yes  No



# Community capacity support to advance racial equity

## Budget Note Response Form

Submitted to Metro Council on Tuesday, February 18th, 2020.

Authors: Metro DEI staff, with direction and support from community partners and Metro staff

### **Executive summary**

Metro Council instructed Metro staff to propose a program that would support long-term partnerships with community-based organizations serving communities of color to expand their civic and community engagement capacity. This budget note is, in part, a result of the expansive work of Metro's multiple investment measures that seek to improve livability and racial equity outcomes across the greater Portland region and the growing demand this places on community partners to ensure communities of color are represented in their design, decision-making and implementation. In response, Metro's DEI team led a co-creative process with non-profit organizations led by and for people of color to design a pilot community capacity building program to meet this growing demand. We outline this three-year pilot program in this budget note response.

Metro Council's investment in a Community Capacity Building for Racial Equity pilot program would build the capacity of community partners to work on our mutual regional equity goals. It would do this through multi-year grants to build capacity for civic and community engagement and support a cohort of partners to meet their shared needs around technical assistance, topical education and staff development. Together, these investments would work to build sustained capacity among community-based organizations to advance racial equity across Metro priorities and within Clackamas, Washington and Multnomah counties. When these CBOs succeed in their mission, they advance livability in the region for everyone. This pilot program represents a strategic investment in the relationships between Metro, its community partners, and communities of color – relationships that are currently difficult to sustain and are not likely to deepen through Metro's existing suite of community partnership activities.

### **Program Design Committee Recommendation**

The Program Design Committee recommends Metro Council invest in a community capacity building program for racial equity to meet the urgent needs of Metro's CBO partners and invest in the long-term success of Metro's initiatives. The Committee recommends implementing a grant program with additional program resources to support coalition-building, which aligns with staff-generated options 2 and 3 outlined in this proposal. Annual costs for these options range from \$600,000 - \$800,000.

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## Summary of budget note

Metro Council's budget note directed Metro staff to propose a Metro-wide program that would:

- develop long term strategic partnerships to advance racial equity in greater Portland;
- leverage and expand upon existing Metro-wide community partnerships to support community capacity building efforts;
- address increased demand on community partners to participate in regional initiatives;
- strengthen and sustain the ability of community partners to advocate for racial equity in Metro programs, policies and practices.

## The challenge

### **The region is changing and Metro's role is expanding**

The greater Portland region is becoming more racially and ethnically diverse, and Metro's work in advancing racial equity and livability is expanding through its investment measures and ongoing policies, programs and plans. Metro must ensure that Black, Indigenous, and other communities of color benefit from these efforts through expanded commitment to inclusive governance. Communities of color -who have been systematically denied access to political power, decision-making processes and the resources that stem from these decisions - should have *opportunities* to shape their own communities and the *ability* and *capacity* to do so.

### **Community-based organizations are vital partners in advancing racial equity**

Community based organizations (CBOs) who serve Black, Indigenous, and other communities of color continue to be critical drivers of power building in their communities and engage in a broad array of activities that support civic and community engagement. When these CBOs succeed in their mission, they advance livability in the region for everyone<sup>1</sup>. They are vital partners in Metro's efforts to achieve its mission, meaningfully engage Black, Indigenous, and other communities of color, and provide oversight and hold Metro accountable to its commitments. Their partnership is invaluable because Metro relies on these organizations to connect to – and build trust within – these communities where many people harbor distrust due to histories of governmental structures, processes and policies rooted in white supremacy.

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<sup>1</sup> Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion states that "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." (p8)

## **The problem – CBOs are under-resourced to do long-term civic engagement work**

Metro has been rapidly expanding and deepening its work with CBO partners, as directed by Metro’s Strategic Plan to Advance Racial Equity, Diversity and Inclusion<sup>2</sup>. These increasing requests to engage with Metro have a side effect; Metro is outstripping CBO’s ability to engage with us in terms of the demand for their time and, more significantly, the expertise of these organizations’ leadership and members. Furthermore, current models of partnership and engagement –often short term, project-based and narrowly focused – do not necessarily address the longer term demand for these organizations’ capacity needs. While they are important to advancing mutual interests, they are unable to fully build long-term trust and relationships, support leadership development, or provide the technical and topic-specific education needed, all of which are necessary bedrocks of meaningful community engagement and civic participation. Short-term models of resourcing partnerships also create challenges for implementing decades-long projects. For example, our Regional Waste Plan or investment measure implementation will take 10 or more years of work to complete and yet our community partnership grants and contracts usually only span a year or less.

## The proposed solution

### **Invest in CBOs as long-term strategic partners**

Metro and CBOs that serve Black, Indigenous, and other communities of color share elements of a vision of, and commitment to, advancing racial equity, building transformative rather than transactional partnerships, and meaningfully engaging communities in every part of our region. Because of this shared commitment, the role CBOs play in successfully implementing Metro’s investment measures and long-range plans, and the challenges CBOs are facing in expanding and sustaining community and civic engagement across the tri-county region, the Program Design Committee<sup>3</sup> recommends that Metro Council create a Community Capacity Building for Racial Equity pilot program.

### **Program goals**

1. Supports the mutually-beneficial, long-term viability of greater Portland’s community-based organizations who serve Black, Indigenous, and other communities of color and strengthens Metro’s strategic partnership with these organizations;

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<sup>2</sup> Namely, in Goal B – “Metro meaningfully engages communities of color” – but also crucial in supporting Goals A, D and E.

<sup>3</sup> The Program Design Committee included staff from Metro and CBOs. For a full list of members see page 10.

2. Strategically supports CBOs in developing and sustaining civic and community engagement capacity and infrastructure for Black, Indigenous, and other communities of color to meaningfully inform and impact policy and financial decisions, both at Metro and beyond;
3. Creates a vehicle for strategic investment in community capacity in geographic areas and topic areas of interest in anticipation of expanding needs or emerging priorities;
4. Advances Metro’s commitment to regional leadership by growing additional investment from its local government and philanthropic partners;
5. Supports, through coordination and facilitation, ongoing changes to Metro systems and processes that build trust, reduce harm, and repair past harms in its relationships with Black, Indigenous, and other communities of color;
6. Supports Metro-wide best practice sharing, relationship management and deeper integration of community partnership and engagement outcomes into Metro decision-making to maximize the impact of existing partnership work; and
7. Supports Metro advisory and oversight committee recruitment and advances the diversification of these committees through intentional training and recruitment in communities of color, in partnership with community-based organizations.

## Program design

The Program Design Committee recommends a program with one or more of the following program elements, outlined here in order of relative importance:

### **I. Flexible capacity building grants tailored to the needs of the community organization**

The strategy most likely to meet the program objective is multi-year grants to community based organizations (CBOs) serving communities of color to support their capacity for civic and community engagement. Metro staff recommend three-year grant cycles. CBOs, during the grant application process and (if selected) the co-creation of a contract, would determine how these grants could best support their needs within Metro’s parameters. Examples of how these grants might be used include:

- Growing programming in East Multnomah, Washington and Clackamas counties;
- Hiring and retaining staff responsible for civic or community engagement;
- Training or professional development for staff or community members;
- Supporting leadership development programming;
- Supporting general operations to advance an organization’s civic engagement capabilities.

## **II. Program resources**

A secondary potential program element would be resources to support a cohort of grantees as a collective. The Program Design Committee recommended this element in addition to, not instead of, capacity building grants. The use of these funds would be directed by the grant cohort, and could include uses such as:

- Convening for trainings and professional development;
- Funding to convene and strengthen coalitions;
- Technical support (e.g. software, training, or evaluation and assessment support);
- Organizational strengthening (technical or equity-based trainings); and
- Peer-to-peer knowledge sharing or mentorship.

## **III. Direct department support**

A final component of a capacity building program could be direct support and resources supplied by Metro's departments and visitor venues. This could advance the knowledge and skills of the cohort around Metro priority areas and could include activities such as:

- Topic education or technical assistance;
- Development of standard curriculum and materials for topic education;
- GIS and data accessibility and visualization;
- Facilitate relationships with Metro decision-makers;
- Recruit and place community members in Metro advisory and oversight committees;
- Metro-hosted trainings for both Metro staff and CBO partners.

## **Continued program design**

In addition to the proposal outlined here additional program details, such as the exact parameters and restrictions for grant use, grant selection criteria, application process and the makeup of the grant selection committee have yet to be developed. If funded, the program team would work with CBO partners to identify ways to set clear expectations for funding duration and strategies to support grantees that are ramping down program funding.

Again, these program details would be co-created with community partners, mirroring the process used for the development of this proposal. Metro Council would have an opportunity to engage in this process before the details of program administration are finalized.

## Program administration

Metro staff recommend the pilot program be housed in the Office of the Chief Operating Officer, within the Diversity, Equity and Inclusion (DEI) program. Metro staff believe the program would best be served by the proximity to Metro leadership and Metro elected officials – who can best facilitate relationship building between community partners and Metro elected and non-elected decision makers across departments and visitor venues. Furthermore, the Office of the COO and DEI are well positioned to convene internal leaders across the agency to improve communication and coordination. Housing the program in the COO office also supports implementation of reporting, oversight and program refinement and process improvement over time.

Metro staff expects program administration to require 1.0 FTE, which will include additional responsibilities beyond program design and implementation, including but not limited to:

- supporting Communications and other Metro departments in coordinating partnership work and relationship management across the agency;
- convening Metro practitioners and community partners to share best practices to maximize the impact of partnerships while reducing harm and administrative burden to CBOs;
- supporting deeper integration of community engagement and community partnership outcomes into Metro decision-making processes;
- connecting CBO partners, their staff and constituents with Metro opportunities on agency wide advisory and oversight committees;
- ensuring effective communication and coordination happens between community partners and Metro elected officials and Metro staff.

### **Accountability**

Metro is strongly committed to building public trust through practices of accountability and transparency, ensuring the responsible and effective use of public resources. Metro's community partners share this commitment and already work to advance our mutual equity goals in effective and transparent ways. We recognize that accountability is a dynamic, two-way process, whereby both parties should engage in reflective practice and honest dialogue around their role in advancing an effective partnership. Metro staff also recognize that CBOs have experience creating and optimizing programs and measuring their impact. This program would feature systems of accountability co-created with CBO partners. Grantees would work with Metro to define success for that particular partnership, and how best to measure and evaluate impact on equity outcomes. Impact would be measured both through stories (qualitative) and numeric (quantitative) metrics of success.

## Program investment options

Metro staff recommend the following options for consideration. Costs associated with direct department support, described above, are not included in this budget proposal because Metro staff believe the scope and nature of this work should be co-created in the first year of this program so that it can best meet the needs of community partners while advancing Metro’s priorities. Staff resources to implement the program will be re-assigned from existing FTE, adding no additional cost to the program.

**Table 1.** Staff-generated program funding options.

	Program elements	Details	Ongoing annual cost
Option 1: Grants only	Grants	5 partnerships	\$500,000
Option 2: Grants plus program resources	Grants + program resources	5 partnerships and \$100,000 in program resources	\$600,000
Option 3: High-investment	Grants + program resources	7 partnerships and \$100,000 in program resources	\$800,000

### Rationale

#### Option 3: High investment (\$800,000/yr.)

This option sends a strong signal to Metro’s community, government and philanthropic partners that Metro will continue its leadership in advancing racial equity in the region through partnership with community-based organizations who serve communities of color. This option allows for a wider array of partnerships across Metro’s topic areas and geographic areas of interest. It also supports the cohort by providing program resources intended to fill collective needs of grantees and create spaces to share learning and advance knowledge and skills in Metro topic areas. Community partners involved in developing this program expressed strong desire for program resources to support a cohort of grantees.

- Pro: Maximizes impact across geographic areas, topic areas and racial/ethnic groups.
- Con: Places a higher financial burden on Metro.

#### Option 2: Grants plus program resources (\$600,000/yr.)

The need for capacity building is significant and urgent, especially as Metro ramps up investments through its regional investment strategies. The Program Design Committee recommends a minimum annual investment of \$500,000 across five partnerships to address this need. A minimum cohort of five CBO partners also adds value to the program through best-practice and knowledge sharing across



organizations. This option includes a smaller number of grants than Option 3, but should enable Metro to test the efficacy of the program for building community capacity across multiple communities, geographies and topic areas of interest. It also retains program resources to support the cohort of grantees.

- Pro: Program resources maximize the value of convening a grant cohort.
- Con: Increased costs to Metro.

#### Option 1: Grants only (\$500,000/yr.)

This option removes the program resources, focusing solely on capacity building grants, but retains the minimum investment of \$500,000 across five partnerships.

- Pro: Achieves core program objectives and supports strategic geographic investments region-wide.
- Con: Reduces Metro's ability to build knowledge around key areas of interest and does not support shared learning across our partners through the cohort model.

### Program Design Committee recommendation

The Program Design Committee recommends Metro Council invest in a community capacity building program for racial equity to meet urgent needs of Metro's CBO partners and invest in the long-term success of our initiatives. The Committee also sees value in allocating program resources to complement capacity building grants in order to support shared learning and coalition-building. Staff-proposed options 2 and 3 meet these criteria, while option 3 best addresses the urgency and scale of the problem articulated by the Committee.

A variety of reasons suggest the program is best implemented at scale rather than in smaller increments. First, for Metro to see outcomes across geographic areas of highest need – Clackamas, Washington and East Multnomah counties - and across many of its topic areas of interest, more than a few grants are required. Furthermore, the amount of resources, time and energy needed to develop this program with community partners, and the staff time necessary to administer the program, only make sense if more than a few community-based organizations can benefit.

The Program Design Committee also recommends assigning one FTE to this program to support not only continued program design, administration and improvement, but also Metro-wide (1) relationship management and community engagement coordination, (2) advisory and oversight committee recruitment and (3) best-practice sharing to maximize benefit and reduce harm.

## Background

### Process – how the program was developed

Metro Council's budget note directed Metro staff to determine the most effective ways to support community capacity building for racial equity through expanded partnership with community-based organizations. Because community partners know their barriers and needs the best, Metro's DEI team convened a Program Design Committee made up of culturally-specific community-based organizations and Metro staff from across Metro to co-create this budget note response. This committee met three times for facilitated half-day workshops to define potential objectives and components of a program. Metro leadership and staff from Parks and Nature, Waste Prevention and Environmental Services, Planning and Development, Communications, DEI, GAPD, the Office of the COO and the Council Office participated. The organizations that participated on the Program Design Committee included<sup>4</sup>:

- Adelante Mujeres
- Asian Pacific American Network of Oregon (APANO)
- Basic Rights Oregon
- Centro Cultural de Washington County
- Coalition of Communities of Color
- Latino Network
- OPAL Environmental Justice Oregon
- The Portland African American Leadership Forum (PAALF)
- Unite Oregon
- Verde
- Vision Action Network

This proposal for a three-year pilot program reflects the intent and direction agreed upon by the Program Design Committee and the CBO's that participated. Additional content for this proposal was developed by Metro's DEI team in partnership with other Metro staff and Metro leadership and vetted with the Program Design Committee before submission.

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<sup>4</sup> Community Alliance of Tenants, Momentum Alliance and Bienestar provided input outside of the committee process. Native American Youth and Family Center (NAYA) and Causa were invited to participate but did not have the capacity to do so.

## Metro's current investments in community partnerships

Metro works with community-based organizations (CBO) who serve communities of color in a variety of ways. However, no Metro-wide program exists with the explicit intent of building capacity of CBO partners, though a few examples have recently emerged at the department level. This section details the types of partnership work currently in progress at Metro to highlight the breadth, scale and momentum of this work, and illustrate the array of deliverables and outcomes Metro is requesting of community partners. This section also defines the types of community partnerships and illustrates the relationship between them to help set the context for how a capacity building program could amplify the impact of existing partnerships.

### **Types of community partnerships**

Community partnership work takes a variety of forms at Metro, and has grown in scale and depth over the past five years. The chart on the following page (Figure 1) shows the four community partnership models used at Metro, accompanied by examples of existing or past work.

### **Characteristics of existing partnership work**

Most of Metro's existing community partnerships share a few characteristics. It is generally short-term (a year or less), task-specific and include a scope of work with work deliverables. This is often the right type of work to meet Metro's immediate needs and generate our desired outcomes. While these partnerships advance Metro's regional outcomes and goals at the program level, they don't address community partner needs to build long-term capacity and relationships in the communities they serve. This, in turn, jeopardizes Metro's ability to partner with community organizations to facilitate meaningful engagement with communities of color across greater Portland and to effectively advance racial equity across the region. Two exceptions to this type of work, however, include (1) Communication's Community Partnership program which advances long-term partnerships with Momentum Alliance and the Coalition of Communities of Color to support institutional changes and (2) WPES' new contract with Unite Oregon, which attaches capacity building resources to a community engagement services contract in order for Unite Oregon to build capacity in Clackamas County.

## Community partnership models

<p><b>Partnerships for community impact</b></p> <p>Invest through project and programs to make a direct impact in communities and help build trust with community organizations and the people they serve.</p>	<ul style="list-style-type: none"> <li>• Regional Travel Options grants</li> <li>• PILOT grants</li> <li>• 2040 grants</li> <li>• Community enhancement grants</li> <li>• Investment and innovation grants</li> <li>• RID workforce transition program</li> <li>• Nature in Neighborhoods community grants</li> </ul>
<p><b>Partnerships for community engagement</b></p> <p>Engage communities as projects or plans are developed, decisions shaped and implementation supported. This may include specific partnerships to expand education or other service programs.</p>	<ul style="list-style-type: none"> <li>• Transportation funding measure development</li> <li>• Southwest Corridor Plan youth-led anti-displacement cohort</li> <li>• Southwest Corridor Equitable Development Strategy</li> <li>• Housing bond implementation</li> <li>• 2030 Regional Waste Plan development</li> <li>• Multifamily recycling service standards development</li> <li>• Solid waste facility siting and development</li> <li>• Waste Prevention and Environmental Services co-created community partnerships</li> <li>• Parks bond development</li> <li>• Chahalem Ridge Nature Park planning</li> <li>• Parks and Nature Community Partnerships: Metro-led program support</li> <li>• Parks and Nature Community Partnerships: partnership innovation funds</li> <li>• Parks and Nature Community Partnerships: co-created community partnerships</li> </ul>
<p><b>Partnerships for institutional change</b></p> <p>Develop and sustain honest, open and direct relationships with community partners that challenge Metro’s assumptions and processes to create a more equitable institution.</p>	<ul style="list-style-type: none"> <li>• Momentum Alliance/Bridges cohorts:             <ul style="list-style-type: none"> <li>◊ Equitable and culturally responsive partnership practices</li> <li>◊ Community engagement and decision-making process improvements</li> <li>◊ Youth-led equity training for Metro leadership</li> <li>◊ Hiring process and work environment improvements</li> <li>◊ Trauma-informed engagement and work environment</li> </ul> </li> <li>• Solid waste operations workforce equity partnerships</li> <li>• Household hazardous waste collection event service equity partnerships</li> </ul>
<p><b>Partnerships for community priorities</b></p> <p>Invest in community-led programs and activities to support community priorities and initiate or sustain community relationships.</p>	<ul style="list-style-type: none"> <li>• Agency/department sponsorship programs</li> <li>• Community Placemaking grants</li> <li>• Environmental Promoters program partnerships</li> <li>• Waste Picker Collaborative</li> <li>• Parks and Nature Community Partnerships: community-led programming</li> </ul>

Figure 1. Metro’s types of community partnership work, with past and present examples.

### Role of capacity building

If directed by Metro Council, a new capacity building program would not replace existing partnership work. Rather, a program such as the one outlined here would bolster the capacity of community based organizations to continue and expand partnership work with Metro on topics like waste reduction, transportation planning or use of regional parks. It would enable Metro to strategically invest in

partnerships of agency-wide importance to advance regional equity, ensuring the long-term vitality of CBO partners while building and sustaining community capacity, relationships, knowledge and skills around key Metro priorities at the same time.

### **Regional collaboration**

The program being proposed reflects a growing consensus among Metro’s public sector and philanthropic peers that building capacity for civic engagement in communities of color should be a priority. Metro’s DEI team has been in conversations since the fall of 2019 with City of Portland’s Office of Civic Life, Meyer Memorial Trust, NW Health Foundation and North Star Civic Foundation about impacts of a this type of work region-wide and what future collaboration could look like. The DEI team is also in talks with other jurisdictions, including Washington County who approved of \$250,000 for capacity building funding for racial equity in their FY20/21 budget.

### **Risk analysis**

#### **Political**

By implementing this program, Metro may be vulnerable to objection from some local jurisdictions and stakeholders who are uncomfortable with this innovative use of public funds. This program is not without precedent, however – the City of Portland and King County, Washington have similar programs to invest in long-term community capacity building in communities of color. By not implementing this program Metro risks failing to follow through with our commitments to communities of color, and damages our ability to deliver on equity outcomes outlined in our regional investment measures.

#### **Financial**

The program’s multi-year financial commitments to community-based organizations do pose a risk if Metro’s financial situation or priorities were to change. However, not implementing the program may also have financial risks. Investing in community capacity through a reactive and piecemeal approach as community engagement needs arise may mean inefficient investments and project delays.

#### **Policy**

By investing in a community capacity building program to advance racial equity, Metro would increase its capacity to deliver on a range of commitments, aspirations, and legal requirements including:

- The Strategic Plan to Advance Racial Equity, Diversity, and Inclusion:
  - Goal A: Metro convenes and supports regional partners to advance racial equity
  - Goal B: Metro meaningfully engages communities of color

- Goal D: Metro creates safe and welcoming services, programs and destinations
- Goal E: Metro’s resource allocation advances racial equity
- The Regional Waste Plan’s three principles of community restoration, community partnership and community investment, as well as actions outlined in:
  - Goal 4, which directs Metro to “increase the diversity of the workforce in all occupations”;
  - Goal 6, which directs Metro to “reduce product environmental impacts and waste through educational and behavioral practices”, in particular actions 6.1, 6.2 and 6.4;
  - Goal 9, which directs Metro to “increase knowledge among community members about garbage, recycling and reuse services”, in particular action 9.3;
  - Goal 11, which directs Metro to “address and resolve community concerns and service issues”, in particular action 11.1;
  - Goal 13: which directs Metro to “invest in communities that receive garbage and recyclables from the Metro region so that those communities regard solid waste facilities as assets”, in particular actions 13.1, 13.2 and 13.3.
- The Regional Transportation Plan’s Goal 9 (Equitable Transportation): “the transportation-related disparities and barriers experienced by historically marginalized communities, particularly communities of color, are eliminated”.
- The Metro Housing Bond’s core value of leading with racial equity.
- The Parks and Nature System Plan’s mission-critical strategy of ensuring that Metro Parks and Nature programs and facilities support the needs of underserved communities, including communities of color, low-income communities and young people.
- The Parks and Nature Bond Measure’s commitment to making Metro parks and natural areas safer, more accessible and welcoming, especially for low-income families and communities of color.
- Goal 1 of Oregon’s statewide planning goals, which requires us to provide opportunities for community members to be involved in all phases of planning processes.

**Date: February 10, 2020**

**To: Metro Councilors**

**From: Marcus C. Mundy, Coalition of Communities of Color  
Glenn Montgomery, Vision Action Network**

**Re: Metro Capacity Building Budget Note**

This brief note is to summarize our thoughts and reflections, as co-chairs, of this Metro conceived and implemented capacity building exploration for community-based organizations and, just as important, a group of organizations representing minority, LGBTQ, low income, immigrant and other resource and access challenged populations in the Metro catchment area.

Vision Action Network (VAN) and the Coalition of Communities of Color (CCC), in our role as convening organizations, were both represented by our respective Executive Directors, as were many of the participating organizations (Adelante Mujeres, APANO, Basic Rights Oregon, Centro Cultural, Latino Network, OPAL, PAALF, Unite Oregon, and Verde).

We were proud to serve as co-chairs of Metro's program design committee for the response to the community capacity building budget note. We accepted these roles because our organizations are conveners in Multnomah and Washington counties. We have also experienced first-hand the challenge of inadequate organizational capacity that plagues community-based organizations who serve communities of color. We know what it means for the communities we serve – they go unrepresented at decision-making tables, they don't see themselves in the region's future plans, and they feel harmed, rather than strengthened, from the investments. As such, we encourage Metro Council to implement the program co-created by the committee so that the organizations we serve, and others, can expand their work with Metro to advance racial equity in every part of our region.

Metro brought together a host of community partners, all having a solid record of delivering programs and services to the community in under-resourced platforms, to assess what was most needed and how to further these efforts in a community-centric and culturally specific manner. Throughout the process, our group tackled accountability, reporting structures and systems (and how Metro could help community), distribution of grant funds versus programmatic funds, and how best to further the development of stronger agency/community relationships.

In the last session, Councilor Chase participated most of the day and heard directly from the community about their needs, as well as their opinions on how any potential Metro funding for ongoing capacity building work should be distributed.

This exercise was well thought out and well implemented, and it could serve as a prototype for future engagements with the community. While the proof is in the pudding, including how these funds are ultimately distributed with clearly defined guardrails on their use, it is key to note that throughout the process, Metro communicated transparently, brought in facilitation and site resources to support the work, held the sessions in culturally specific, non-Metro, community-based organizational spaces, and essentially lived up to its own equity and mission statements – something not all jurisdictions do.

Beyond sharing our reflections, we also want to thank the Metro team writ large for such an inclusive, open and honest process, and more specifically the Metro Councilors who approved this work, and Councilor Chase for championing it. In every single session we had tremendous participation from not only the Diversity, Equity and Inclusion (DEI) staff of Metro, which was significant, but from an array of other departments and leaders in the organization. They engaged with our group, listened, participated, and received a more clear understanding of the intersection of DEI work with their own (which is to say that ALL of the team's work, and ALL of Metro's work, is DEI work).

It is noteworthy that Metro is considering an investment of hundreds of thousands of dollars for a group of entities who are perennially constrained. That you are doing so with an equity lens in an unapologetic manner is a breath of fresh air.

We experienced this through our participation in the three offsite meetings, reinforced by the feedback we received from virtually all participating organizations.

Thanks again to Councilor Chase, Raahi Reddy and her amazing team, our facilitators, and Metro for commissioning this crucial exploration. Whether the initial investment is \$400,000, \$500,000 or more, the community will be served well by the work we have done together.

Warm regards,



Marcus C. Mundy, Executive Director



Glenn Montgomery, Executive Director



Cc: Raahi Reddy, Metro



**FY2021 Budget Discussion: Department Budget – Support  
Services**

*Work Session Topics*

Metro Council Work Session  
Thursday, February 27, 2020  
Metro Regional Center, Council Chamber

## **STAFF REPORT**

### **SUPPORT SERVICES PRESENTATION OF 2020-21 BUDGET AND MODIFICATION REQUESTS WITH AN EMPHASIS ON HOW PROGRAMS ALIGN WITH COUNCIL PRIORITIES**

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Date: February 3, 2020  
Department: Support Services (AMCP,  
Communications, DEI, Finance, HR, IS,  
Research Center)  
Meeting Date: February 27, 2020

Prepared by: Lisa Houghton, x1829,  
lisa.houghton@oregonmetro.gov  
Presenter: Heidi Rahn  
Length: 20 minutes

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#### **ISSUE STATEMENT**

Metro's Chief Operating Officer, acting as Metro's Budget Officer, will present the FY 2020-21 Proposed Budget and Budget Message to Council on April 16, 2020.

This work session will provide Council the opportunity to hear how the Support Services FY 2020-21 base budgets and modification requests align with Council priorities. Information shared at the work session will help guide development of the FY 2020-21 Proposed Budget.

#### **ACTION REQUESTED**

Council discussion and feedback on the base budget and modification requests submitted by the department.

#### **IDENTIFIED POLICY OUTCOMES**

Development of a FY 2020-21 budget that aligns with Council priorities.

#### **POLICY QUESTION(S)**

What are the policy implications and tradeoffs that will result from the department's base budget and any approved modification requests? Specific factors for Council consideration may include:

- How well do the department's programs align with Council priorities?
  - Does the base budget represent a good investment in Council priorities?
  - Do proposed modification requests advance Council priorities?
- Has the department demonstrated sufficient planning to successfully implement any new programs or projects?
- Will the department need additional General Fund support to implement their new programs or projects?
  - If yes; how high a priority are the programs compared to others that also require General Fund support?

#### **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

Each department's modification requests may be considered for support and inclusion in the FY 2020-21 Proposed Budget. Some, none or all of the department's individual items may be supported by Council.

#### **STAFF RECOMMENDATIONS**

The Chief Operating Officer and Chief Financial Officer recommend Council hear all the department presentations prior to determining their support for departments' modification requests.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

Each department's FY 2020-21 base budget was developed following the Chief Financial Officer's budget instructions released in early December. The base budgets allow the departments to continue existing programs and projects as adjusted for various factors such as inflation, COLAs, etc.

New programs, projects, additional appropriations and FTE are requested through the department's modification requests. Once approved the modification requests are built into the Proposed Budget scheduled for presentation to Council on April 16<sup>th</sup>.

Historically modification requests that require General Fund support far exceed the amount of support that can be provided.

- **Legal Antecedents**

The preparation, review and adoption of Metro's annual budget is subject to the requirements of Oregon Budget Law, ORS Chapter 294. The Chief Financial Officer, acting in their capacity as the designated Budget Officer, is required to present a balanced budget to Council, acting in their capacity as our Budget Committee.

## **BACKGROUND**

Each department will provide information pertaining to their base budget and modification requests.

## **ATTACHMENTS**

None.

- Is legislation required for Council action? No, not at this work session
- What other materials are you presenting today? None.

## **Regional Investment Strategy Update**

*Work Session Topics*

Metro Council Work Session  
Thursday, February 27, 2020  
Metro Regional Center, Council Chamber

## REGIONAL INVESTMENT STRATEGY: TRANSPORTATION INVESTMENT MEASURE

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Date: 2/5/2020

Departments: GAPD, Planning & Development

Work session date: Feb. 27, 2020

Prepared by: Craig Beebe,  
[craig.beebe@oregonmetro.gov](mailto:craig.beebe@oregonmetro.gov)

Presenters: Andy Shaw  
[andy.shaw@oregonmetro.gov](mailto:andy.shaw@oregonmetro.gov);

Margi Bradway,  
[margi.bradway@oregonmetro.gov](mailto:margi.bradway@oregonmetro.gov)

Length: 60 min.

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### **ISSUE STATEMENT**

The Metro Council has directed staff to work with community and partners on a potential 2020 transportation investment measure. The measure is designed around project investments in some of the region's most congested and dangerous travel corridors and additional programs that make investments beyond these corridors.

At this work session, staff will provide an update on questions raised by Council at work session on Jan. 14, 2020, regarding proposed investments in the 82<sup>nd</sup> Avenue, Sunrise/Highway 212 and Clackamas-to-Columbia corridors. Staff will also provide an update on analyses of potential outcomes of measure investments.

### **ACTION REQUESTED**

Provide further direction for issues or questions to explore regarding proposed Tier 1 investments and/or potential outcomes of the transportation investment measure.

### **IDENTIFIED POLICY OUTCOMES**

The Metro Council has directed that a measure advance the Regional Transportation Plan, Strategic Plan to Advance Racial Equity, and Climate Smart Strategy; engage diverse partners and community members; and leverage affordable housing and parks and nature investments. The Metro Council approved specific policy outcomes for the potential transportation measure and appointed a Transportation Funding Task Force in early 2019.

In order to advance its desired policy outcomes, the Council has directed staff to develop a measure that focuses investments in key regional travel corridors and also includes regionwide investment programs to spread benefits throughout the region. Council direction on the measure structure is further described in the "Background" section below.

### **POLICY QUESTIONS**

Based on the information staff provided today, should staff continue working with local partners on development of proposed measure investments at 82<sup>nd</sup> Avenue and Airport Way, the 172<sup>nd</sup>-190<sup>th</sup> connector road in the Clackamas-to-Columbia corridor, and the Sunrise/212 corridor?

Overall, is staff on track to bring you a Final Project Recommendation in April?

## **POLICY OPTIONS FOR COUNCIL TO CONSIDER**

In December, after months of engagement and discussion of staff investment recommendations, the Transportation Funding Task Force recommended roughly \$3.81 billion in measure investments in thirteen Tier 1 corridors. These investments would leverage more than \$2 billion in expected federal and local investments, and complement proposed regionwide programs making additional investments beyond the corridors.

Most of the Task Force's recommendations were unanimous. Two proposed investments fell short of unanimous consensus. The 82<sup>nd</sup> Avenue and Airport Way intersection project reached the threshold for a formal recommendation, while a proposed connector road from 172<sup>nd</sup> to 190<sup>th</sup> Avenue in the Clackamas-to-Columbia corridor received majority support from the Task Force but not the percentage required for a formal recommendation.

Staff and the Task Force co-chairs presented the Task Force's recommendations at work session on Jan. 7, 2020. On Jan. 14, the Council directed staff to proceed with the majority of the Task Force's recommendations, but requested more information regarding 82<sup>nd</sup> Ave. and Airport Way, the proposed connector road, and the Sunrise/212 corridor. At this work session, staff will respond to these requests. Council could direct staff to proceed with project development and/or request more information about these proposed investments.

## **STRATEGIC CONTEXT & FRAMING COUNCIL DISCUSSION**

Greater Portland is growing quickly. It's fundamental to our future to have a variety of safe and reliable options for people to get where they need to go – however they get there.

Metro has been working since early 2018 to lay the foundation of a collaborative, comprehensive investment plan that makes getting around safer, faster and more affordable for everyone. The Metro Council has directed that this plan include investments throughout the region, supporting the many ways people travel. The council has directed that this work must place advancing racial equity and addressing climate change at its core. The council has also directed staff to engage a wide range of community members, partners and leaders to identify smart solutions supported by a broad coalition.

Greater Portland voters' decisive approval of the regional affordable housing bond in 2018 and regional Parks and Nature bond renewal in 2019 demonstrates their eagerness to address the critical issues we face across the region. The Council is also considering referring a regional supportive housing funding measure to the ballot for the May 2020 election. A regional transportation measure in November 2020 represents a significant opportunity to continue connecting priorities to address urgent needs, investing to improve lives and increase opportunities throughout the region.

## **BACKGROUND**

In December 2018, the Metro Council adopted a Regional Transportation Plan update, following years of engagement that included more than 19,000 engagements with residents, community and business leaders, and regional partners. Through the extensive engagement that shaped the plan, Metro heard clear desires for safe, smart, reliable and

affordable transportation options for everyone and every type of trip. The 2018 Regional Transportation Plan is built on key values of equity, climate, safety, and congestion relief.

At work sessions in January 2019, the Metro Council provided guidance on key outcomes, principles and the structure of a potential investment measure to help advance these values. The council also approved a charge for a diverse and regionally inclusive Regional Transportation Funding Task Force. Co-chaired by Commissioners Jessica Vega Pederson and Pam Treece, the Task Force has met 17 times. The Task Force has reviewed Metro Council direction and policy regarding the measure; identified additional desired outcomes; provided input to Council on priority corridors, regionwide programs and possible revenue mechanisms; and made recommendations on Tier 1 investments.

In June, informed by input from the Task Force and an online survey completed by approximately 3,500 area residents, the Metro Council directed staff to move 13 “Tier 1” corridors into further project identification, development and engagement. The council also identified 16 “Tier 2” corridors that could also be considered for funding if there is revenue capacity. Over summer 2019, three Local Investment Teams toured the Tier 1 corridors and provided feedback to inform staff and Task Force project recommendations.

Following a summer of in-depth engagement with community-based Local Investment Teams and project development with jurisdictional partners, Metro staff released a preliminary Tier 1 corridor projects and regionwide programs recommendation to the Transportation Funding Task Force on Oct. 18, 2019. The Task Force discussed these recommendations, proposed amendments, and finalized their own recommendations – most of them unanimous – on Dec. 19, 2019. The \$3.81 billion in proposed Tier 1 investments would leverage approximately \$2.22 billion in expected federal and local funds, for a total of approximately \$6.03 billion in recommended corridor investments.

In September 2019, informed by input from community forums in the spring and Task Force discussions in the summer, the Metro Council advanced nine regionwide programs to for potential inclusion in the measure, at an expected investment of \$50 million annually. Staff are developing these programs further with community and jurisdictional partners. At the Metro Council’s direction, staff are also developing a program to create community-based anti-displacement strategies in corridors funded through the measure. Staff plan to bring a refined program recommendation to the Metro Council in April.

The Metro Council will continue to direct staff in future iterative policy discussions, including options for project investments, possible additional corridors to include in the measure, regionwide programs, revenue mechanisms, oversight and accountability, and implementation. The council could consider referral to voters in late spring.

- Is legislation required for Council action? **Legislation will be required for referral.**

Materials following this page were distributed at the meeting.





BUILDING  
COMMUNITY

February 24, 2020

Raahi Reddy  
Director, Diversity Equity and Inclusion Program  
Metro  
600 NE Grand Avenue  
Portland, OR 97232-2736

Dear Ms. Reddy:

I wanted to write this letter of appreciation for Metro's efforts to support community based organizations (CBOs) serving communities of color. Meyer Memorial Trust believes that race is often a determinant of social, economic and political inequities, and that it is critical to prioritize support for people of color, Indigenous communities and immigrants and refugees, especially if they experience intersecting oppressions.

Our recent interactions with Metro staff in the DEI, Parks and Communications departments have made clear that we share an interest in assessing our collective investments to encourage civic participation among CBOs that serve communities of color. Along these lines, we have benefited from Metro staff's participation in emerging conversations that Meyer has hosted among a mix of philanthropic organizations and governmental agencies interested in encouraging civic engagement among communities of color. Through our grant making and in other ways, we hope to encourage a more inclusive and participatory democracy as a means to transforming structures, policies and practices that perpetuate exclusion and inequities.

Metro's intentional approach to co-design plans with CBOs increases the likelihood of success and connects with our belief that efforts to achieve racial equity must be defined and led by the people most impacted by oppression. Like other forms of systems level change, we have been learning that encouraging civic engagement takes time. With this in mind, we appreciate having the opportunity for continued collaboration with colleagues at Metro.

Sincerely,

A handwritten signature in black ink, appearing to read 'Dahnesha Medora', written in a cursive style.

Dahnesha Medora  
Building Community Portfolio Director

# Capacity building budget note response

*February 27<sup>th</sup>, 2020*

Raahi Reddy, DEI



# Budget note summary

- Directive: Propose a program that...
  - Addresses increased demand on CBO partners
  - Develops long-term partnerships
  - Builds community capacity to advance Metro goals and investment measures
- Key questions
  - What's the need? Where are the gaps?
  - What could a program look like?
  - What are possible outcomes?

# Process

## CBO Staff

- Marcus Mundy, Coalition of Communities of Color
- Glenn Montgomery, Vision Action Network
- Andrea Chunga-Celis, Adelante Mujeres
- David Martinez, Latino Network
- Huy Ong, OPAL Environmental Justice Oregon
- Jenny Lee, APANO
- Joy Alise Davis, Portland African American Leadership Forum
- Kayse Jama, Unite Oregon
- Maria Caballero Rubio, Centro Cultural de Washington County
- Nancy Haque, Basic Rights Oregon
- Vivian Satterfield, Verde

## Metro Staff

- Craig Beebe (GAPD)
- Sebrina Owens-Wilson (DEI)
- Ernest Hayes (Council)
- Jon Blasher (Parks)
- Raahi Reddy (DEI)
- Molly Chidsey (WPES)
- Rob Nathan (WPES)
- Eryn Kehe (Planning)
- Jim Middaugh (Comms)
- Nathan Sykes (OMA)
- Juan Carlos Ocana-Chiu (Parks)



# Finding #1 – increasing demand

## Metro's efforts are expanding – asking more of CBO partners

### Ongoing plans and investment measures

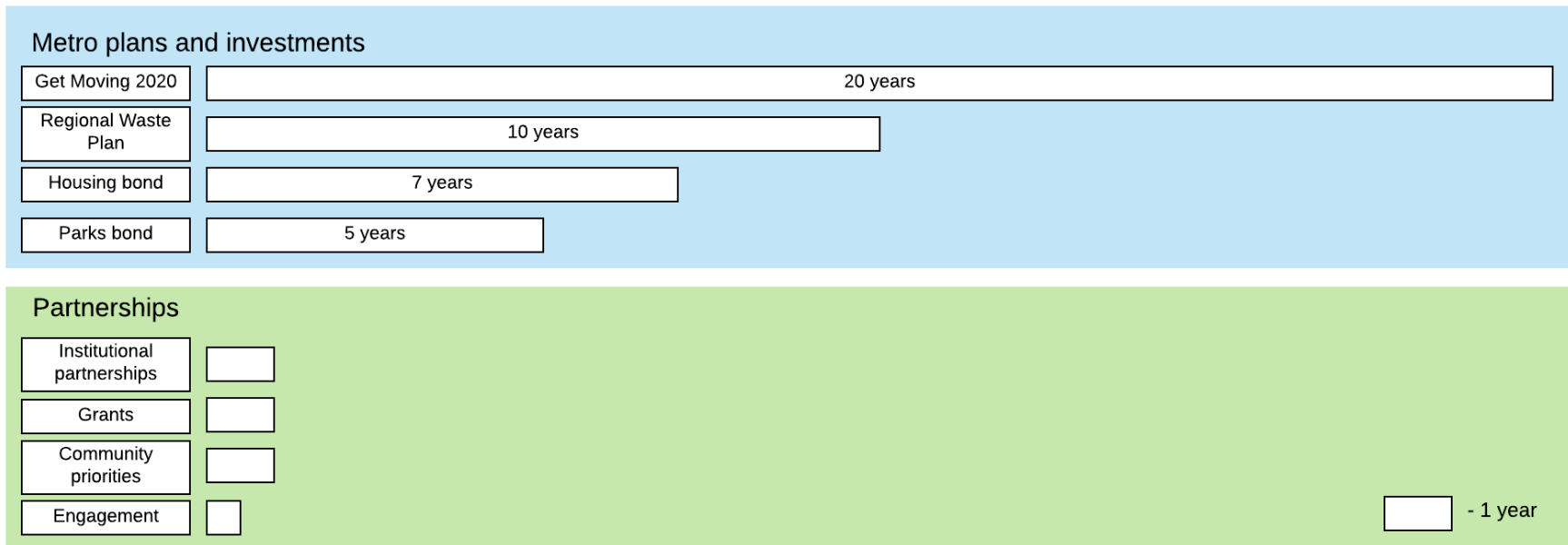
1. Strategic Plan to Advance Racial Equity
2. Regional Transportation Plan
3. Affordable housing bond
4. Regional Waste Plan
5. Parks and natural areas bond
6. Supportive Housing Services
7. Get Moving 2020
8. Transfer station projects
9. And more!

### Roles

1. Planning
2. Engagement
3. Implementation
4. Oversight

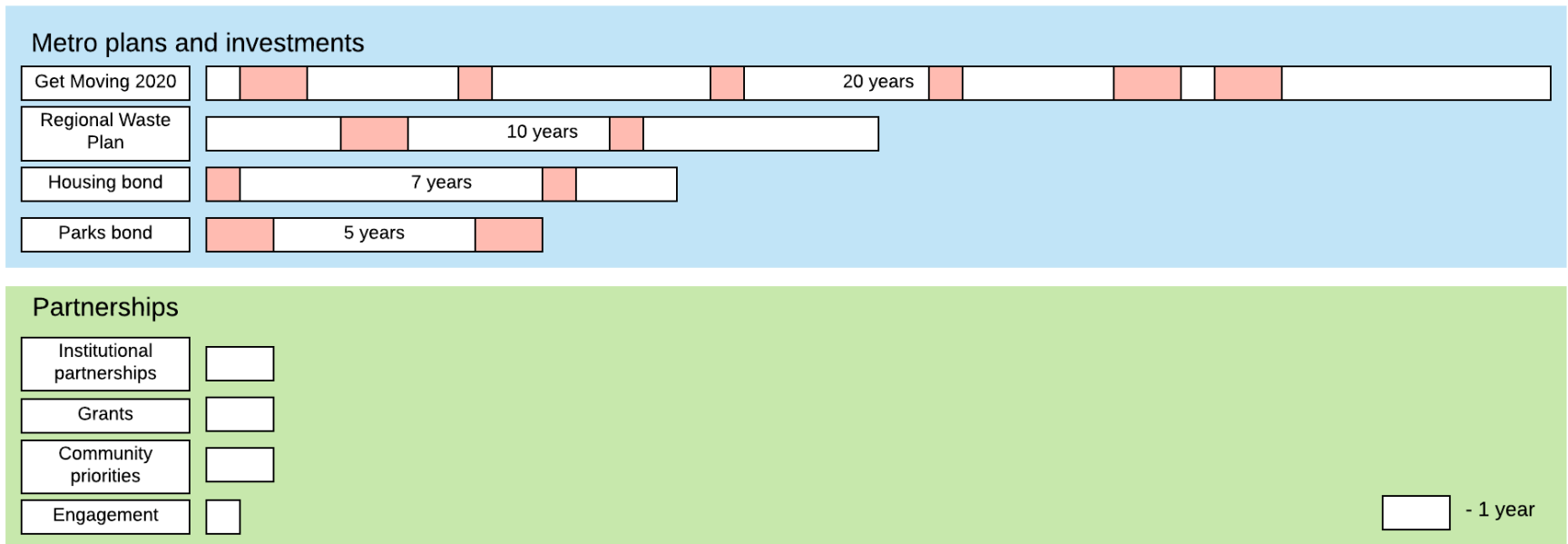
# Finding #2 - new model needed

Metro's models of partnership don't match our long-term vision and investments



# Finding #2 - new model needed

Metro's models of partnership don't match our long-term vision and investments



# Finding #3 - it's about relationships

CBOs need capacity to build and sustain relationships

- CBOs find that current partnership models alone are not translating into long-term capacity in their communities
- Trust and relationship building takes time and sustained engagement
- We have to invest in people



# Case studies

## Case Study #1

### *Clackamas County Transfer Station*

- RFP for engagement went unanswered
- CBOs didn't have established relationships
- WPES had to invest in capacity building
- **Likely outcome: new relationships in Clackamas county**

## Case Study #2

### *SWEDS*

- Metro recognized the need for community capacity
- Deployed \$275,000 to support 6 partners for one year
- Meyer Memorial stepped in to then provide gap funding year 2
- **Planned multi-year funding would have supported more robust and sustained engagement leading up to planned investments**

# Program concept

## Capacity building grants

- Three year cycles
- Flexible use
- Co-created outcomes and metrics

## Program resources

- Support shared learning
- Meet collective needs

## Department support

- Leverage Metro's expertise
- Advance knowledge and skills

# Options for consideration

	Program elements	Details	Ongoing annual cost
<b>Option 1: Grants only</b>	Grants	5 partnerships	\$500,000
<b>Option 2: Grants plus program resources</b>	Grants + program resources	5 partnerships and \$100,000 in program resources	\$600,000
<b>Option 3: High-investment</b>	Grants + program resources	7 partnerships and \$100,000 in program resources	\$800,000

# Potential outcomes

- More people of color in Clackamas, East Multnomah and Washington counties **engage with Metro**
- CBO staff and community members **expand knowledge and expertise** around Metro issues
- CBOs are able to **better meet Metro's needs** for community engagement, consultation, etc.
- More CBOs and people of color **see Metro as a trusted partner** in advancing a shared vision
- New community leaders sit on Metro **advisory and oversight committees**

# Regional collaboration

Metro is not in this alone.



# Questions for Council

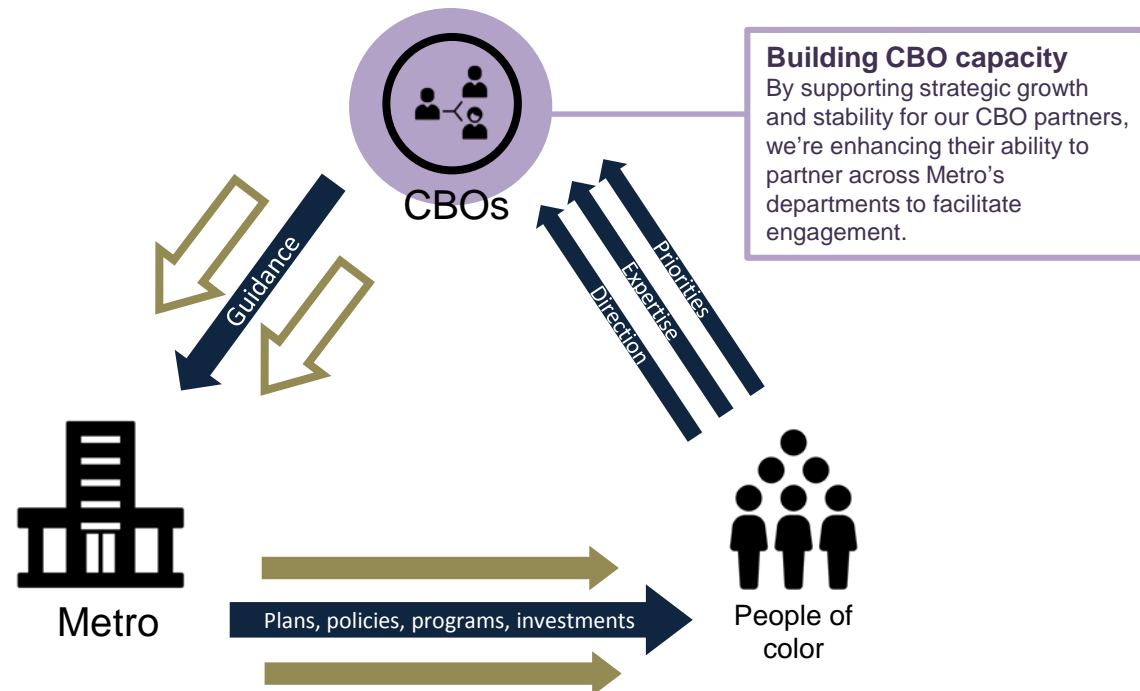
- Should Metro implement a pilot capacity building program?
- Does the proposed program meet Council's expectations and desired outcomes?
- What level of investment would Council direct the COO to pursue?

**oregonmetro.gov**



# Finding #3 - it's about relationships

CBOs need capacity to build and sustain relationships







Metro



# Support Services FY21 Budget

February 27, 2020

# Support Services Departments

Capital Asset Management

Communications

Finance

Human Resources

Information Services

Office of the COO

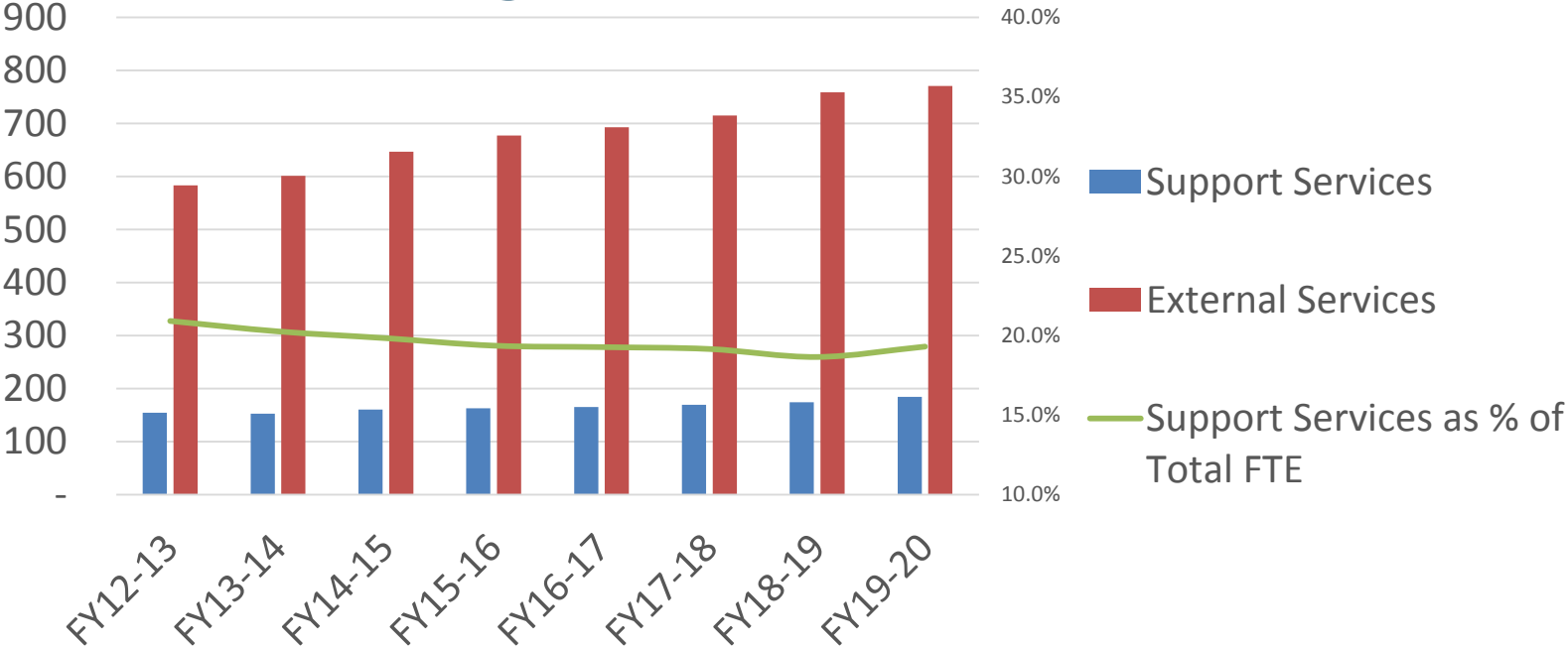
(DCOO, DEI, GAPD, Org. Performance)

Research Center

**Maintain public trust**

# Program growth

## FTE growth



# Results of uneven growth

- Limited knowledge of capital asset risk
- Reduced resilience and innovation
- Recruiting and retention challenges

# Aligning with Council priorities

- Climate and resilience
- Equity Initiatives
- Regional Investment Strategy
- Core Metro Support
- Employer of Choice

# Climate and Resilience

**Using data,  
coordination,  
engagement and  
implementation to  
achieve Council's  
desired outcomes**



# Climate and Resilience

- Regional and operational climate change strategy, data, and story telling
- Regional and operational resilience planning

## **Considerations**

- Additional investments in climate and resilience resources and data or prioritize within existing programs
- Provide direct support for diesel retrofits or assess market response to new standards



# Equity Initiatives

**Building a more  
equitable agency  
and region**





# Equity Initiatives

- Improve community partnerships and planning with racial equity resources and tools
- Implement Construction Careers Pathway and mandatory supervisor training

## **Considerations**

- Add capacity for equity data analytics or shift existing efforts
- Grow capacity with our community partners or maintain status quo

# Regional Investment Strategy

Investing  
strategically in  
communities  
across greater  
Portland



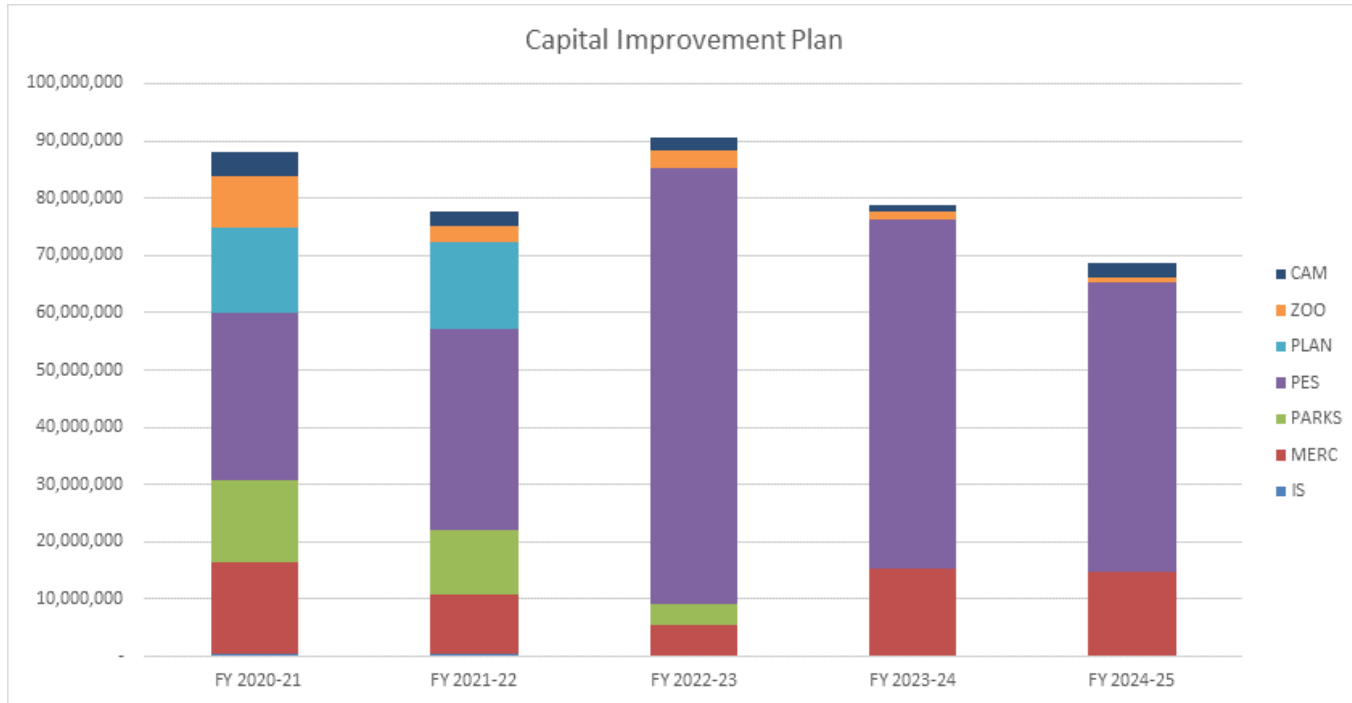
# Regional Investment Strategy

- Coordinate strategy development, research efforts and regional affairs work
- Transportation measure data support
- Parks and Nature bond implementation
- Invest in capital project management

## **Considerations**

- Shift existing resources or invest in additional capacity to deliver

# Capital Improvement Plan



# Core Metro Support

- Build efficiency in financial systems
- Coordinate services across the agency
- Drive process improvement and accountability
- Develop performance measures and goals
- Upgrade data for programs such as land use and housing

## **Considerations**

- Additional investments in financial software and systems or maintain status quo

# Employer of Choice

**Better training,  
engagement,  
onboarding,  
tools and  
resources**



# Employer of Choice

## Engagement Drivers

1. Learning & development opportunities
2. To know what is expected of them
3. To be heard
4. To be recognized and thanked

## Employee Engagement

- Metro's annual employee engagement survey
- Themes are aligned with these engagement drivers
- Efforts to provide the engagement drivers in the workplace require more from Support Services departments

# Employer of Choice

## Learning & Development

- Increase training opportunities
- New Learning Management System
- Supervisor Boot Camp
- Mandatory training requirements

## Tools & Resources

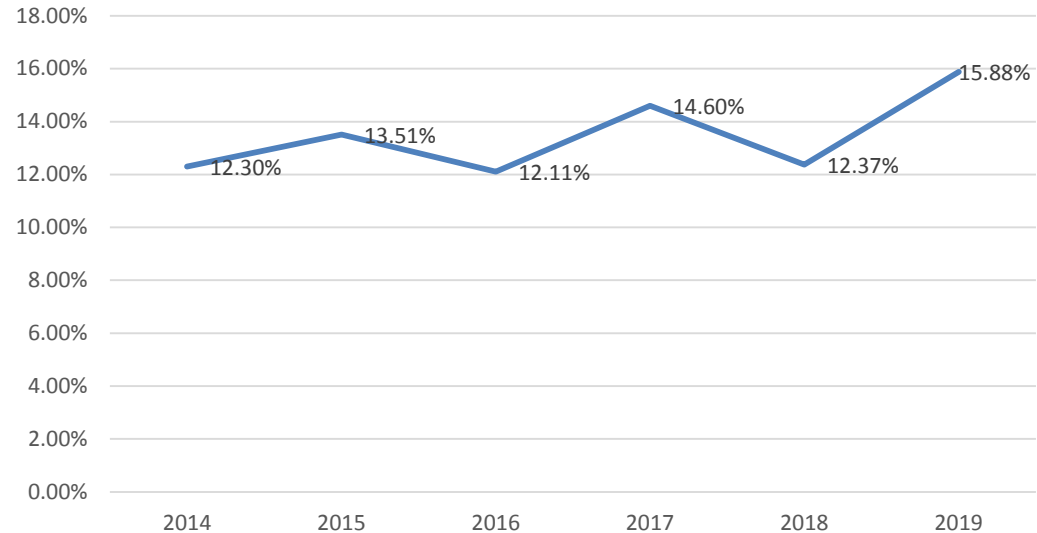
- Working on increased communication efforts (focused on VH employees)
- Improving software systems to increase productivity & resilience
- Investing in payroll systems to improve accuracy & efficiency



# Employer of Choice

- Equity Lens
  - Diverse Workforce
  - Transit Passes
  - Email Accounts
  - Benefits on Day One
- Eye on Retention
  - Increased turnover

Turnover 2014-2019



The data above reflects turnover of regular status (and not variable hour) employees.

# Employer of Choice

## Considerations

- Additional investments in engagement, learning, development, tools and resources or maintain status quo

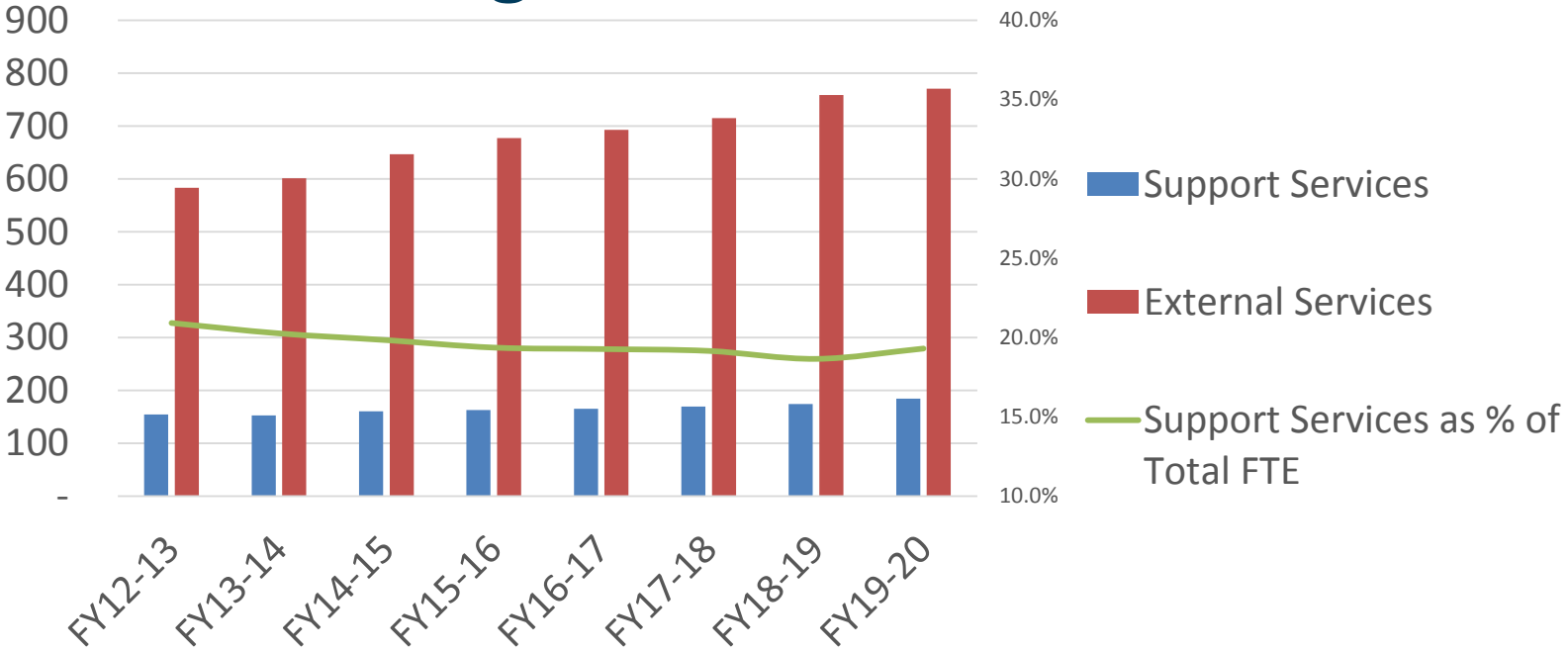
# Council Direction

Policy guidance needed over the next 12 months

- Regional Investment Strategy
- Emergency Operations Plan
- Clean Air Construction Standards
- Regional Barometer
- Budget adoption

# Program growth

## FTE growth



# Council Input – Trade Offs

Overall investment in Support Services vs. External Service

- Scope: maintain status quo or invest in new systems, people and processes
- Schedule: address new priorities simultaneously or develop a phased approach to leverage existing capacity
- Budget: add or reallocate existing resources

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



# Capital Asset Management

- One FTE to build a career ladder in CPMO and support smaller capital projects, \$115k
- Metro's share of the Clear Air Construction Standard regional program, \$25k
- One FTE to support Parks and Nature Bond capital projects, \$125k
- Construction Careers Pathway collective investment in workforce supply, \$200k

# Communications

- One FTE to focus on marketing and internal communications for HR and DEI, \$111k
- One FTE to coordinate opinion research to inform the Regional Investment Strategy, \$121k
- Continued funding for Partnerships for Institutional Change program, \$200k
- One FTE to support project management core communications program support, \$75k
- Support for developing agency-wide translation services plan, \$35k



# Finance

- Three FTE for timekeeping support to improve payroll accuracy, \$268k
- One FTE to support Parks and Nature Bond investments, \$94k
- One FTE Administrative Specialist to support growth in procurement and risk management programs, \$74k
- Investments in software to automate manual processes and improve project and grant accounting, \$875k

# Human Resources

- One FTE to support training and development for Metro employees, \$151k
- One FTE to support business systems in Human Resources, \$137k
- One FTE to support recruitment for new WPES staff, \$137k

# Information Systems

- Support for licensing for enterprise applications, upgraded core software and improved resiliency of Kronos, \$861k

# Office of the COO

- One FTE to create coordinated regional strategy for climate change and related materials and services, \$183k
- One FTE to support Regional Investment Strategy and regional and Federal affairs work, \$182k
- Support for Regional Barometer and Innovators program, \$183k

# Research Center

- Support for improvements to Metro's land use allocation forecast model, \$100k

# Transportation Funding Measure: Outcomes update

Metro Council  
Work Session  
Feb. 27, 2020



Metro



# Today's agenda

Outcomes analysis  
updates: Jobs,  
Racial Equity





# Employment Impacts of Get Moving 2020 Tier 1 Corridor Investments



**\$4B**

Estimated total construction  
spending for Tier 1 corridor projects

**37,500**

Estimated total jobs created  
(includes direct and indirect)

**\$98,000**

Average annual income per  
construction job

*DRAFT 2/27/2020  
Figures based on EcoNorthwest preliminary  
analysis of Get Moving 2020 Task Force  
Recommendation on Tier 1 corridor projects.*





2020 TRANSPORTATION FUNDING MEASURE

# Racial Equity Analysis



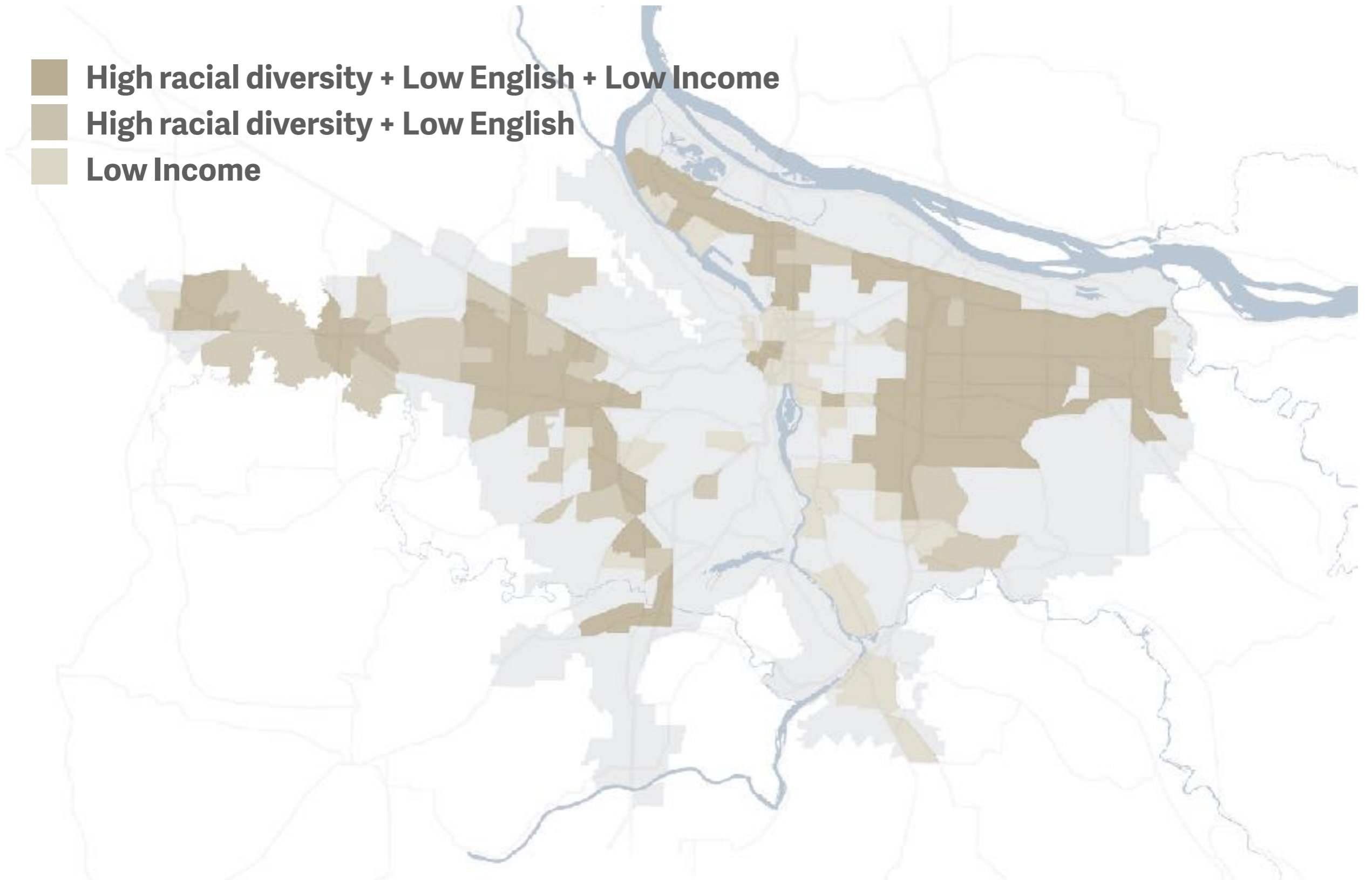


- **Impact and benefit analysis**
- **Racial equity outcomes**
- **Racial equity strategies and accountability mechanisms**

**How does Get Moving 2020  
prioritize equity?**

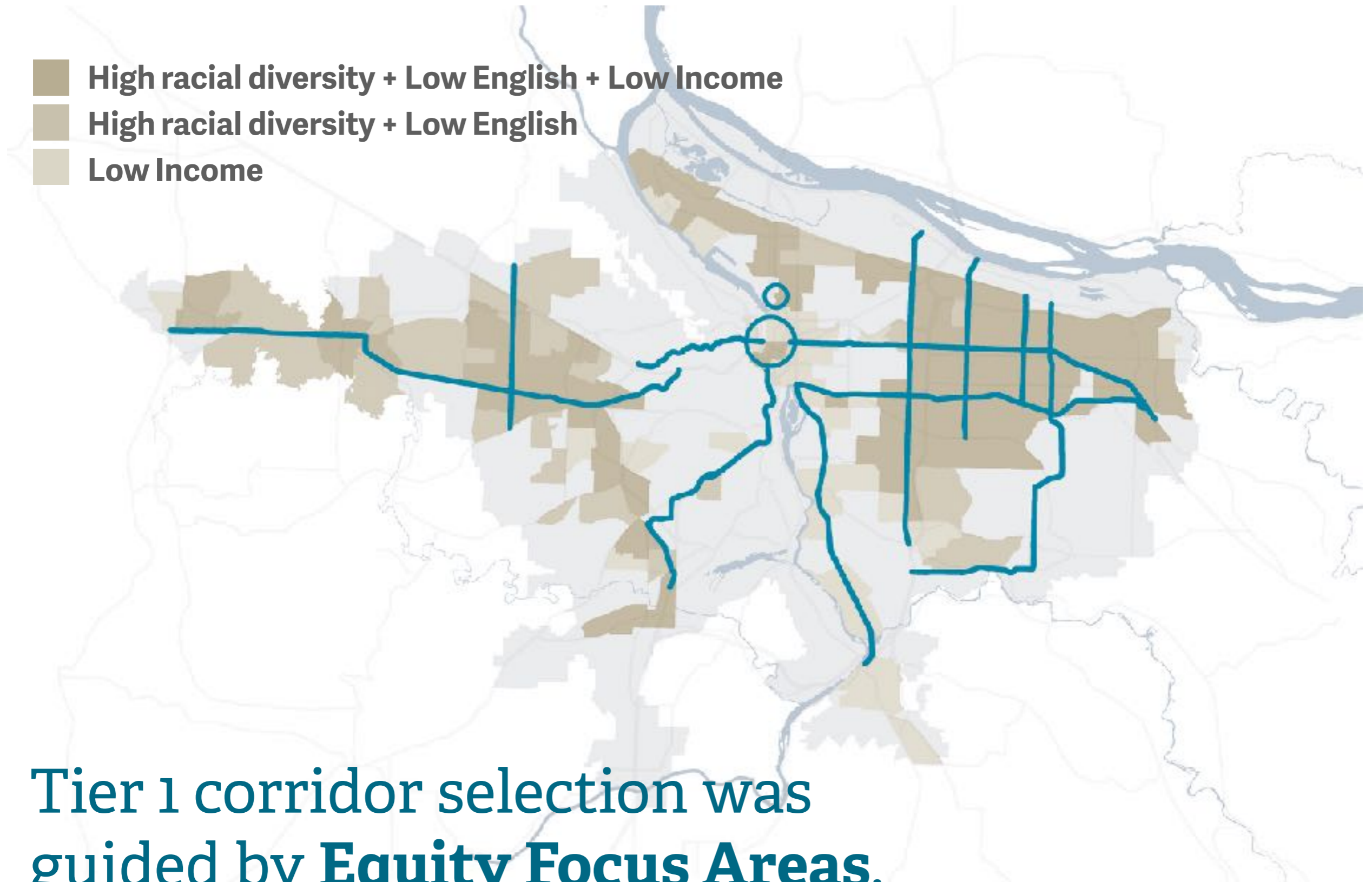
# EQUITY FOCUS AREAS

- High racial diversity + Low English + Low Income
- High racial diversity + Low English
- Low Income



## EQUITY FOCUS AREAS

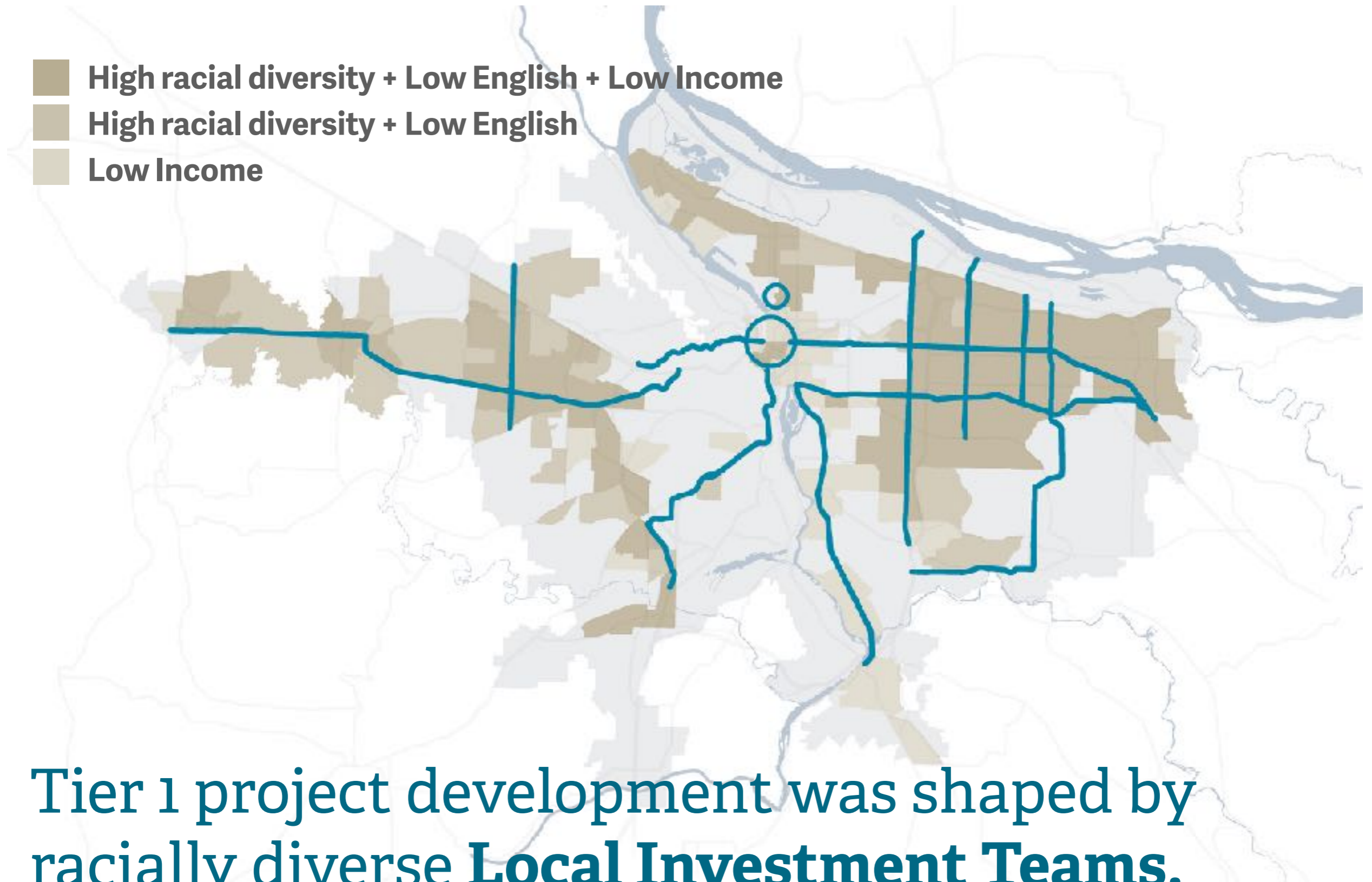
- High racial diversity + Low English + Low Income
- High racial diversity + Low English
- Low Income



Tier 1 corridor selection was guided by **Equity Focus Areas**.

## EQUITY FOCUS AREAS

- High racial diversity + Low English + Low Income
- High racial diversity + Low English
- Low Income

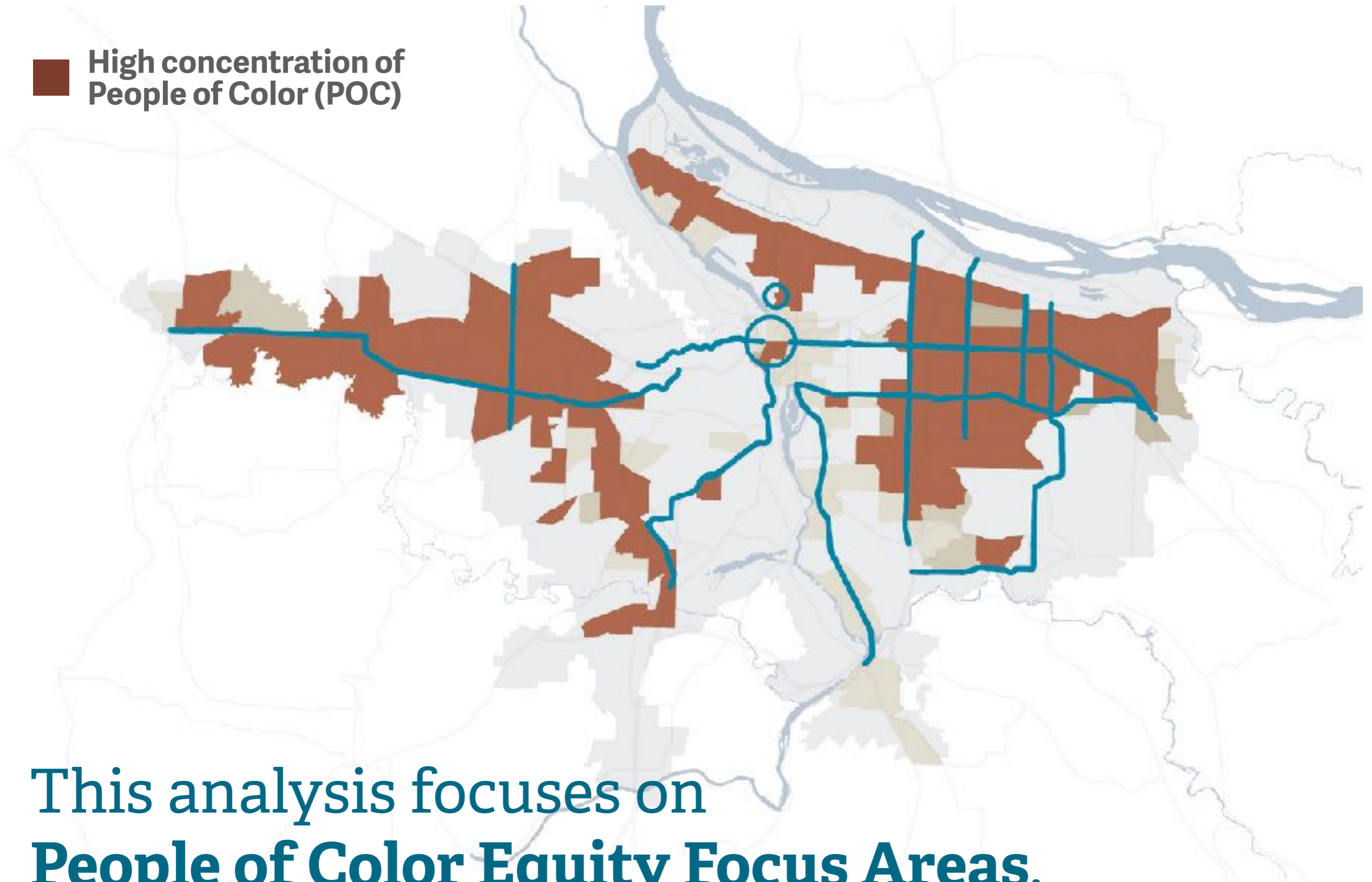


Tier 1 project development was shaped by racially diverse **Local Investment Teams**.



## POC EQUITY FOCUS AREAS

■ High concentration of  
People of Color (POC)



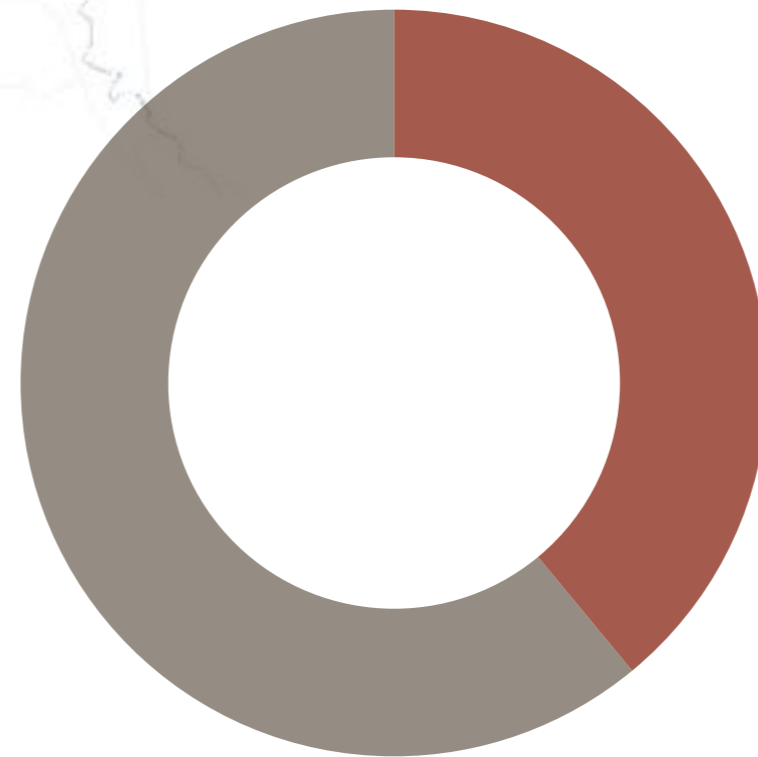
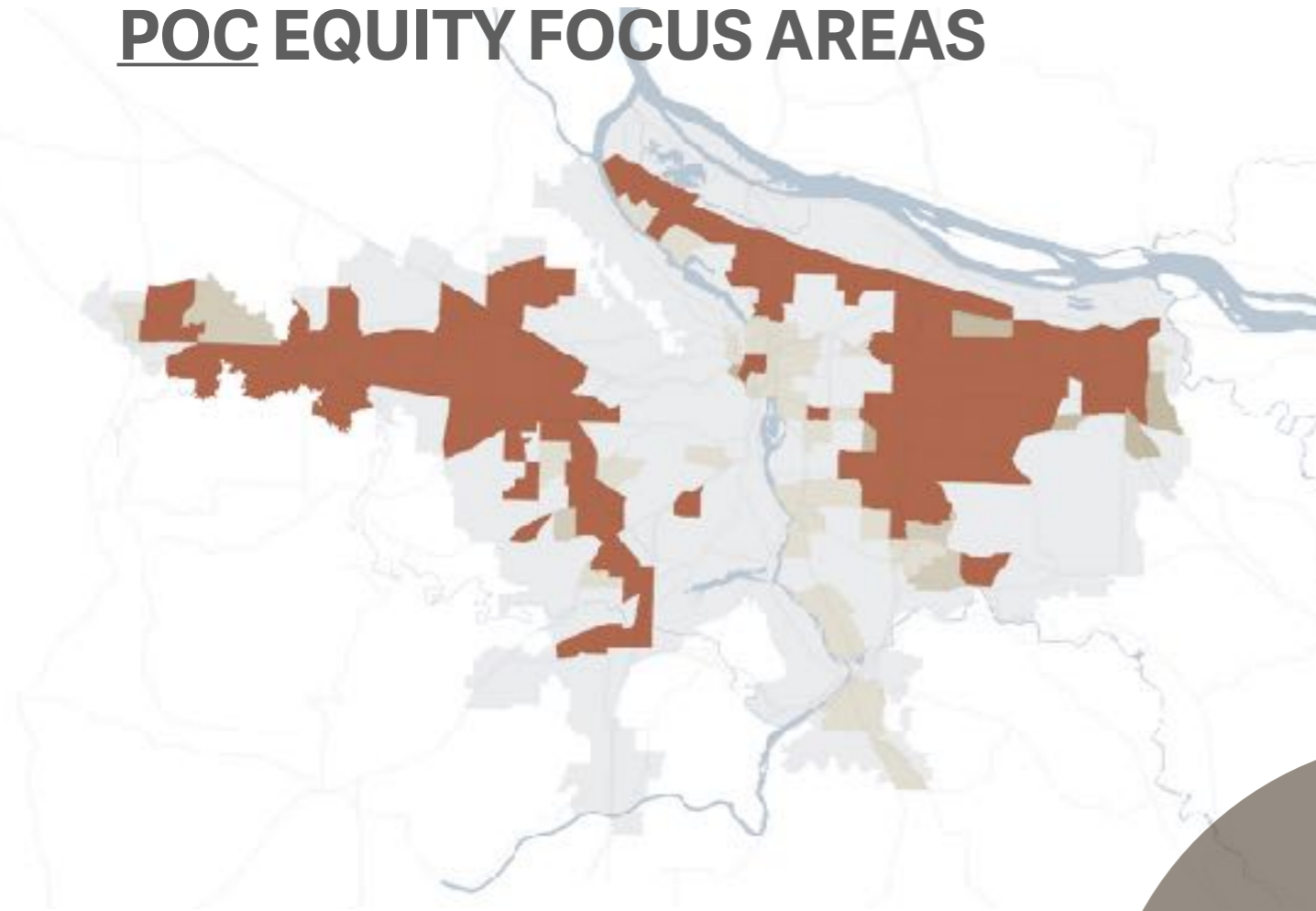
This analysis focuses on  
**People of Color Equity Focus Areas.**

## **KEY FINDING**

**Get Moving 2020 Tier One  
project investments are strongly  
weighted toward areas where  
people of color live.**



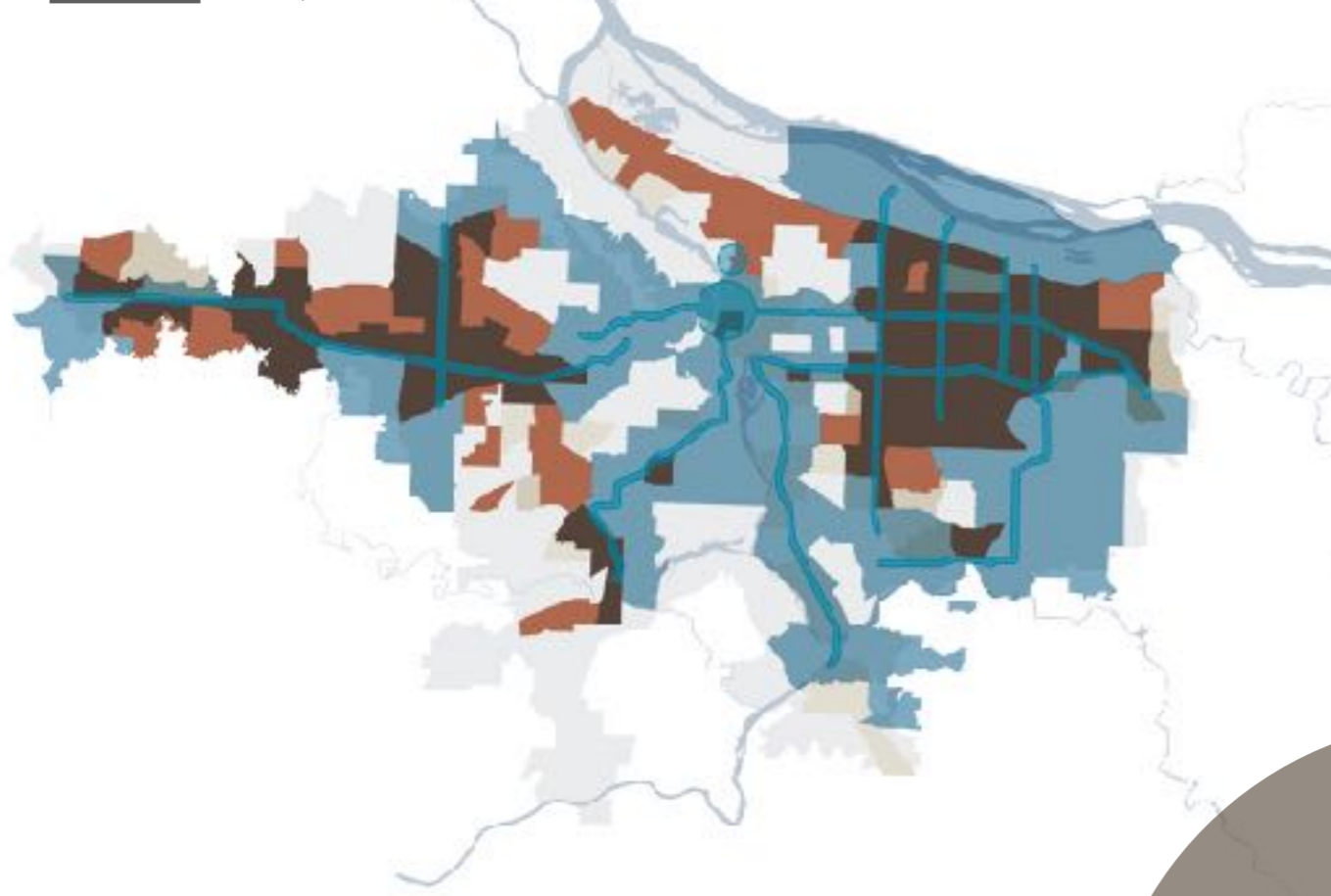
## POC EQUITY FOCUS AREAS



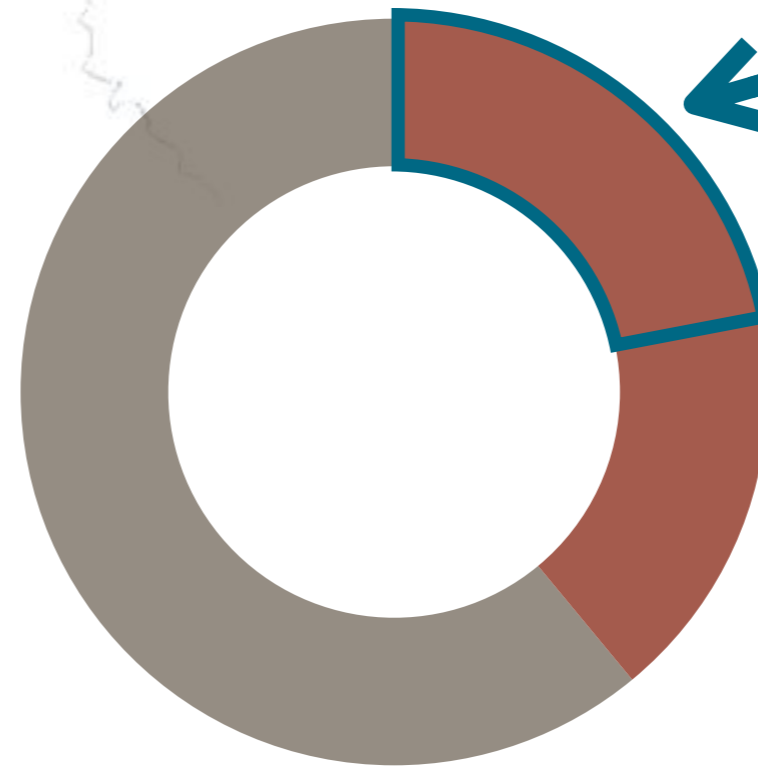
**39%**

OF CENSUS TRACTS  
IN THE REGION HAVE  
AN **ABOVE-AVERAGE**  
**CONCENTRATION OF**  
**PEOPLE OF COLOR**

# POC EQUITY FOCUS AREAS



*High POC  
areas slated for  
Get Moving 2020  
investment*

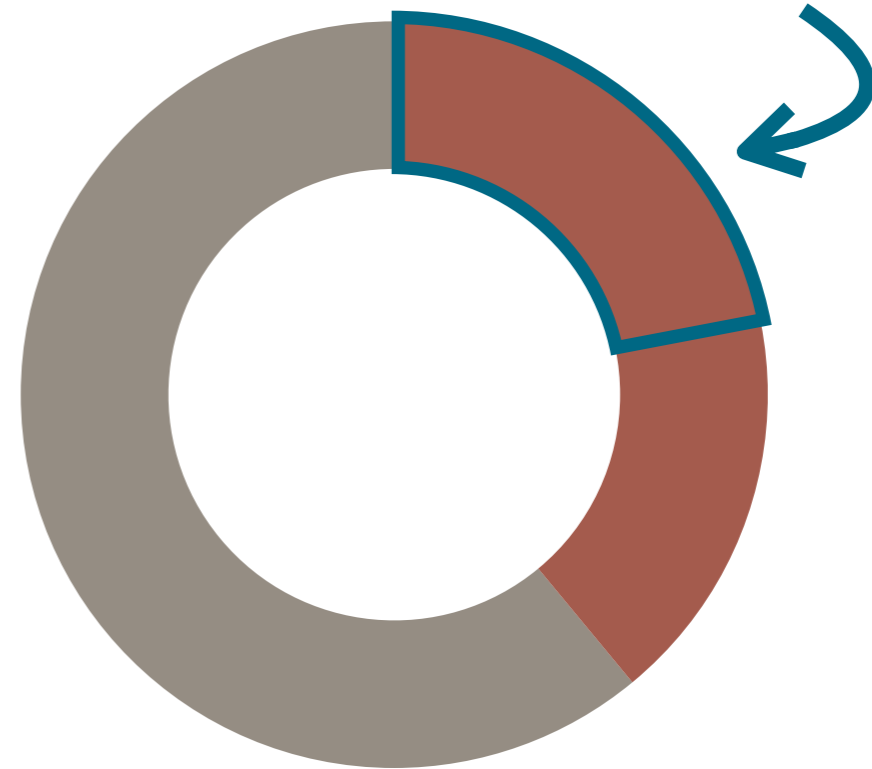


**39%**

OF CENSUS TRACTS  
IN THE REGION HAVE  
AN **ABOVE-AVERAGE**  
**CONCENTRATION OF**  
**PEOPLE OF COLOR**

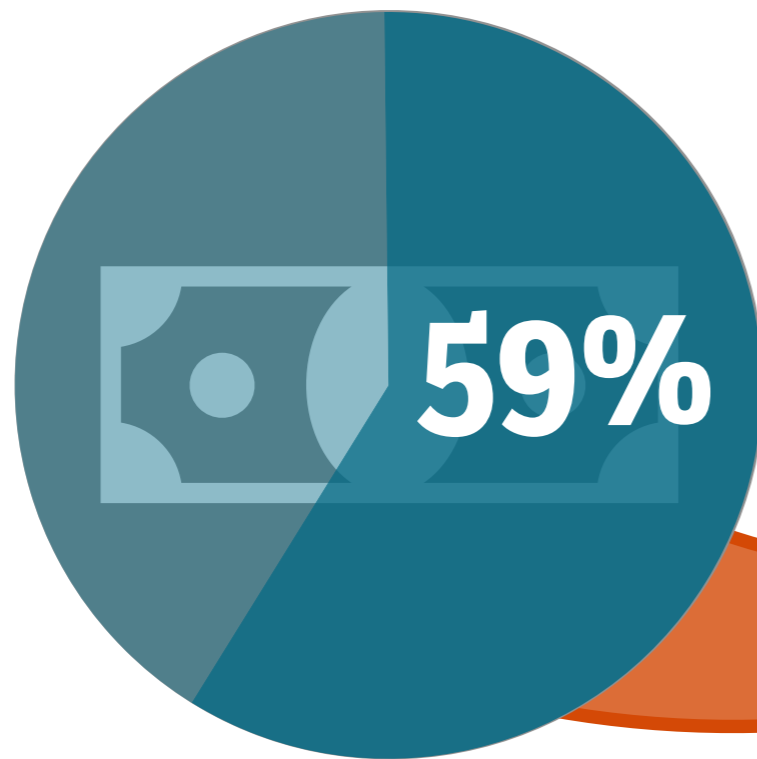
# How much are we investing in these historically underserved communities?

*High POC areas slated for Get Moving 2020 investment*

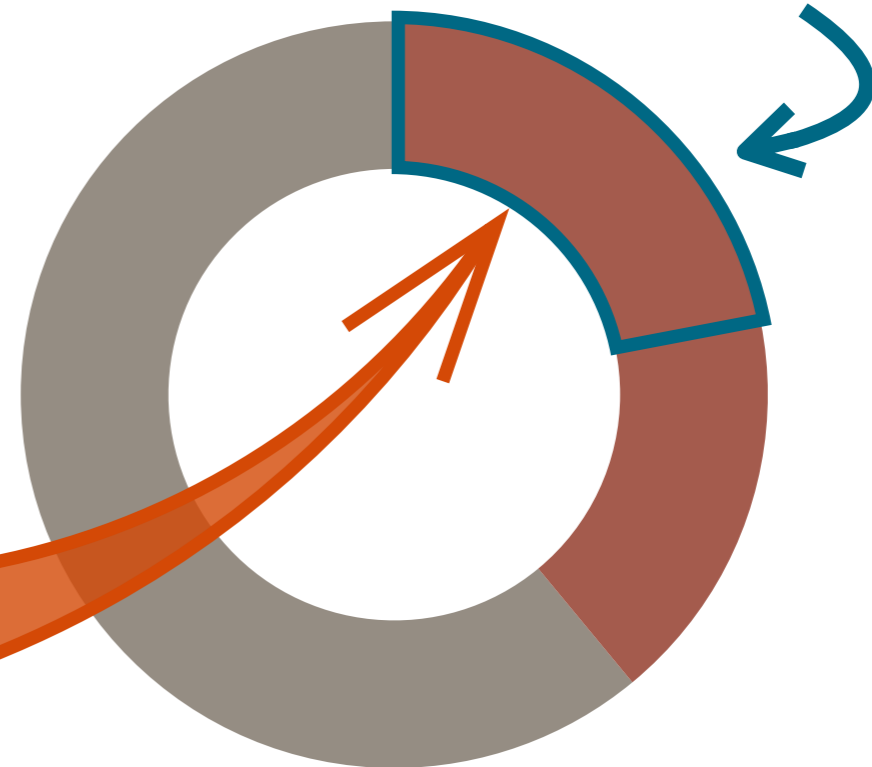


# Get Moving 2020 investments are strongly weighted toward areas where people of color live.

*High POC areas slated for Get Moving 2020 investment*



**MORE THAN HALF OF TOTAL TIER ONE PROJECT INVESTMENT**



**ONE QUARTER OF THE REGION'S CENSUS TRACTS**

## **KEY FINDING**

**Get Moving 2020 SAFETY INVESTMENTS are strongly weighted toward areas where people of color live.**

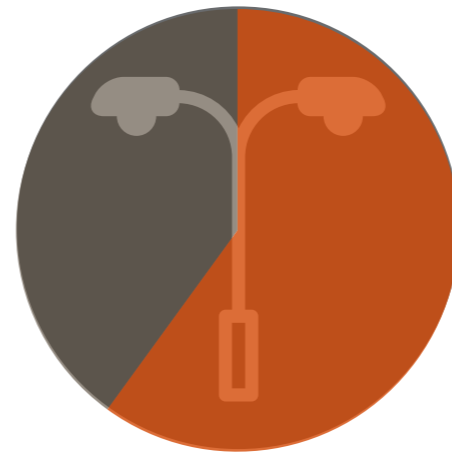
# Portion of Get Moving 2020 Safety Infrastructure Investments in Areas of High POC Concentration\*



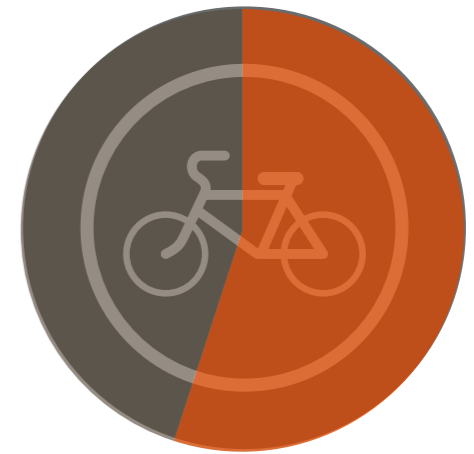
**55%**  
of new  
sidewalk miles



**50%**  
of new safe  
marked  
crossings



**60%**  
of new  
street lights



**55%**  
of improved  
bikeway  
miles

*\*One quarter of the region's census tracts are high POC areas slated for Get Moving 2020 Tier 1 project investments*

# Number of Get Moving 2020 Safety Infrastructure Investments in Areas of High POC Concentration



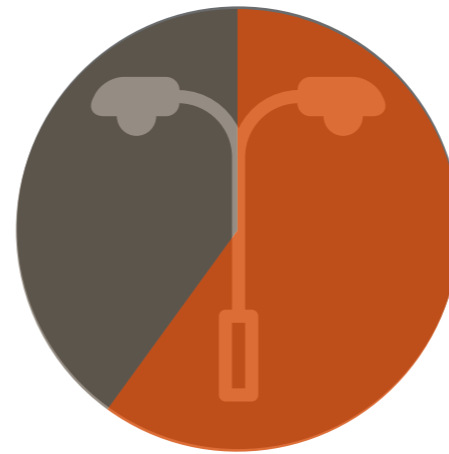
**24**

New  
sidewalk  
miles



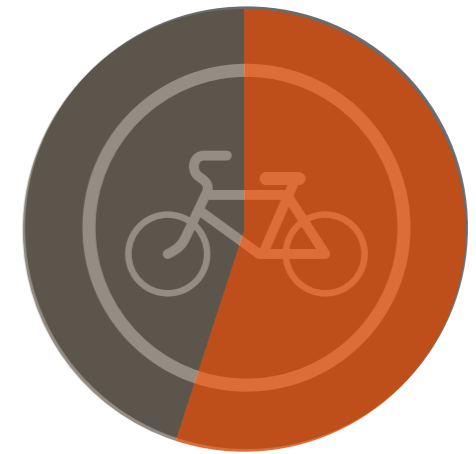
**190**

New safe  
marked  
crossings



**2500**

New street  
lights



**80**

Miles of  
improved  
bikeway

# Portion of Estimated Crash Reductions resulting from Get Moving 2020 in Areas of High POC Concentration



**77%**

of estimated  
reduced injuries  
and fatalities (all  
crashes)



**78%**

of estimated reduced  
injuries and  
fatalities (people  
walking and biking)

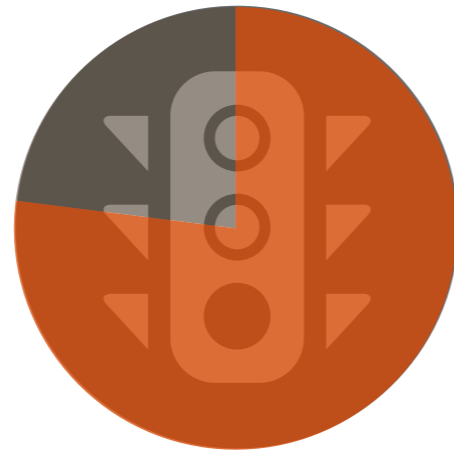
*Estimated safety benefit over 20 years (typical project lifespan). Based on an analysis of the safety performance of Tier 1 corridors and Highway Safety Manual principles, using documented Crash Reduction Factors also used by FHWA, ODOT, and City of Portland.*



## **KEY FINDING**

**Get Moving 2020 investments in TRANSIT ACCESS are strongly weighted toward areas where people of color live.**

# Portion of Get Moving 2020 Transit Investments in Areas of High POC Concentration\*



**80%**  
of Transit  
Signal Priority  
additions

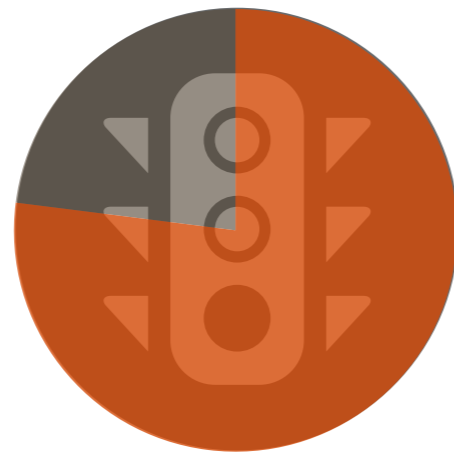


**55%**  
of new bus  
lane miles\*\*

*\*One quarter of the region's census tracts are high POC areas slated for Get Moving 2020 Tier 1 project investments*

*\*\*Doesn't include new bus lanes in the Central City, although these improvements will have system-scale benefits for people of color living in the investment area.*

# Number of Get Moving 2020 Transit Investments in Areas of High POC Concentration



**210**

New transit  
priority signals

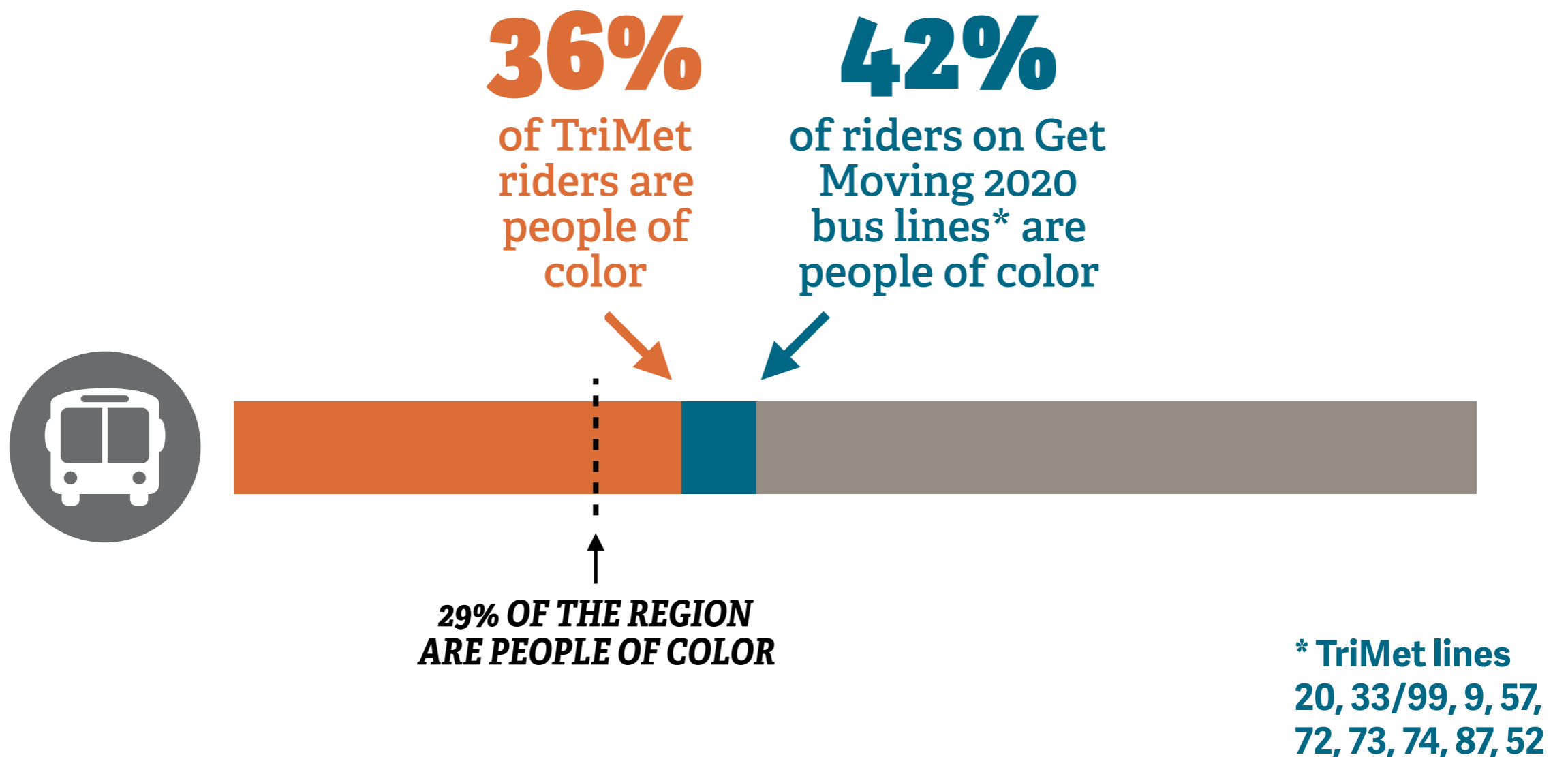


**15**

Miles of new  
bus lanes\*

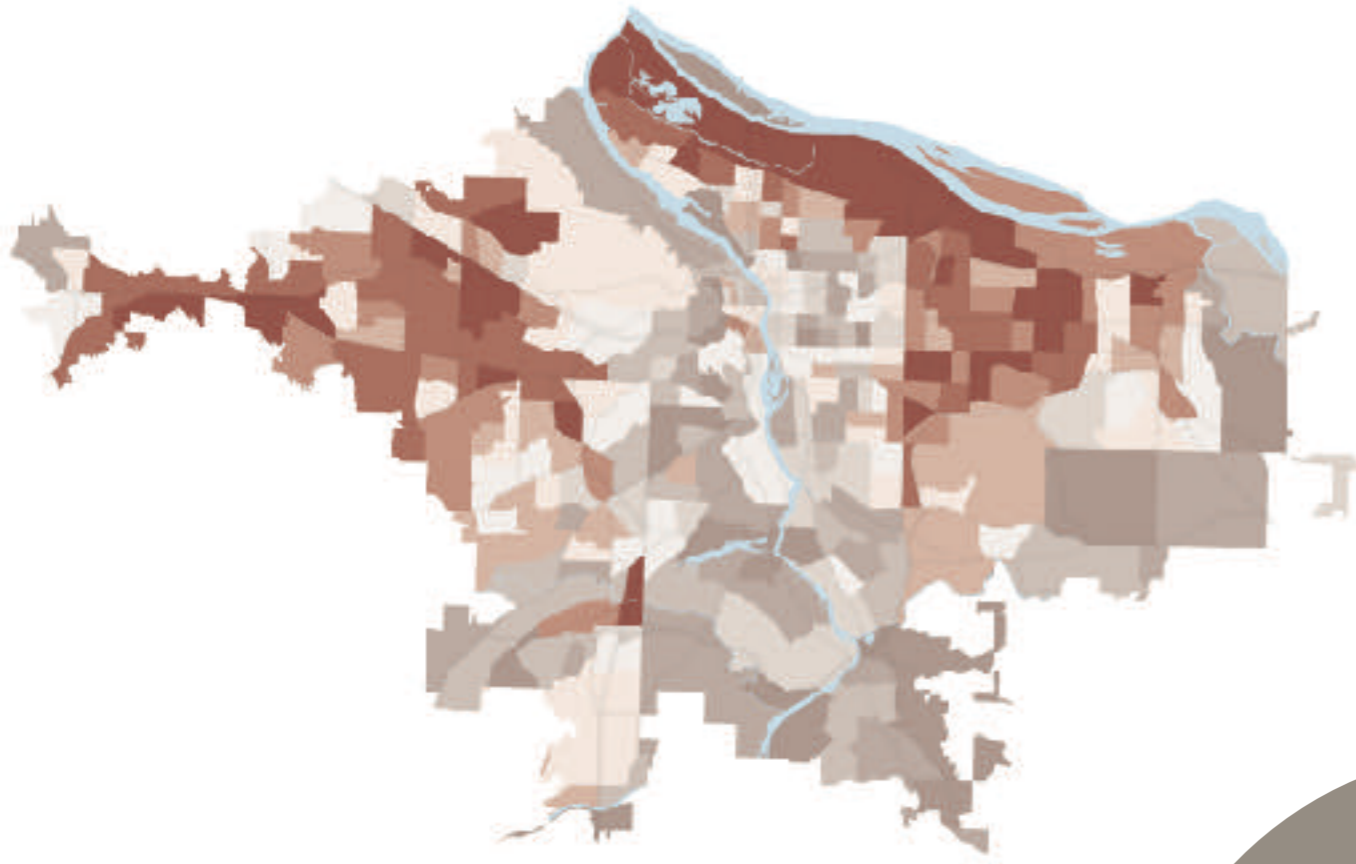
*\*Doesn't include new bus lanes in the Central City, although these improvements will have system-scale benefits for people living in POC Equity Focus areas.*

# People of Color use transit at a higher rate than the rest of the region.



**Who lives in the  
Get Moving 2020  
investment area?**

# REGIONAL DEMOGRAPHIC PROFILE

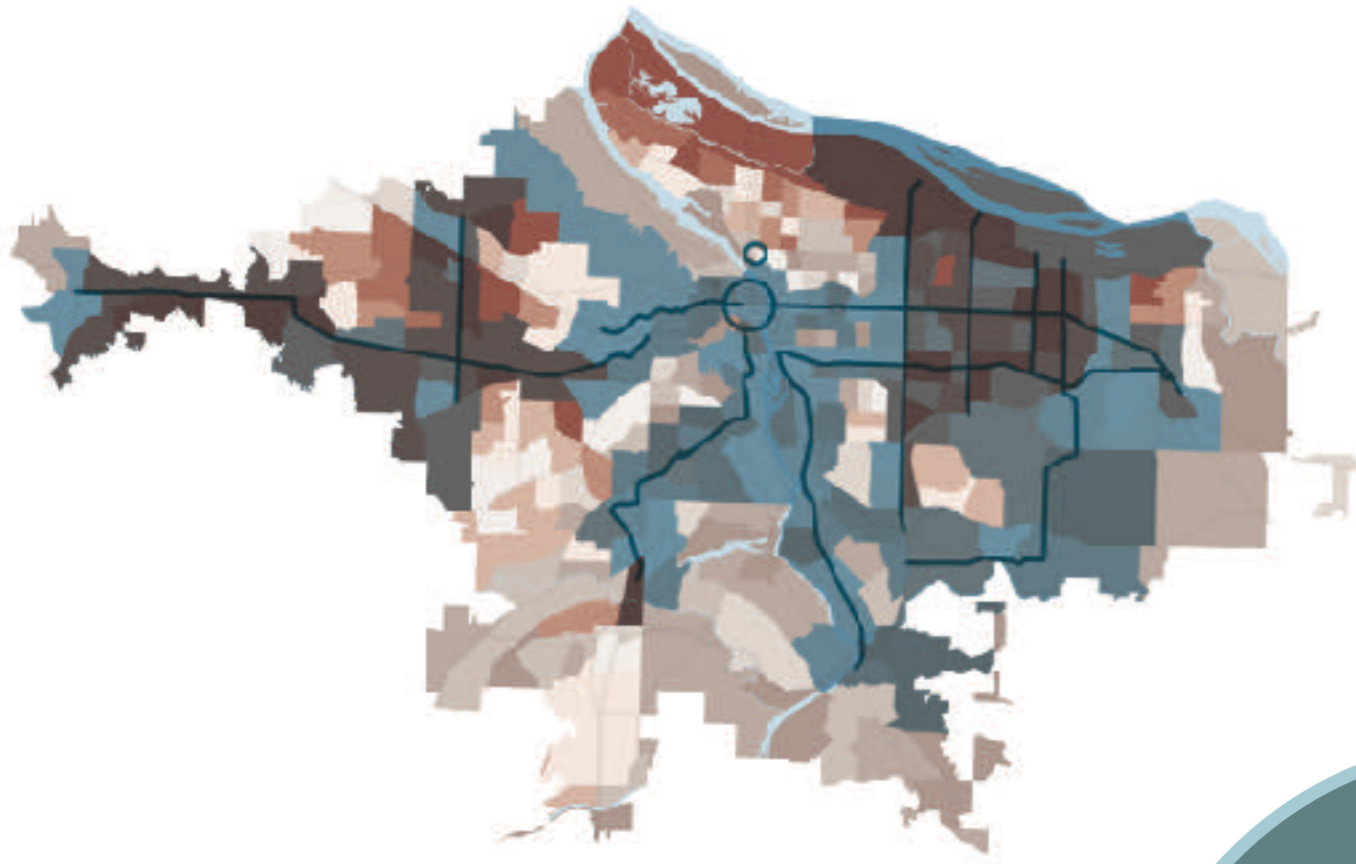


**1.67M**  
PEOPLE LIVE IN  
THE METRO  
AREA

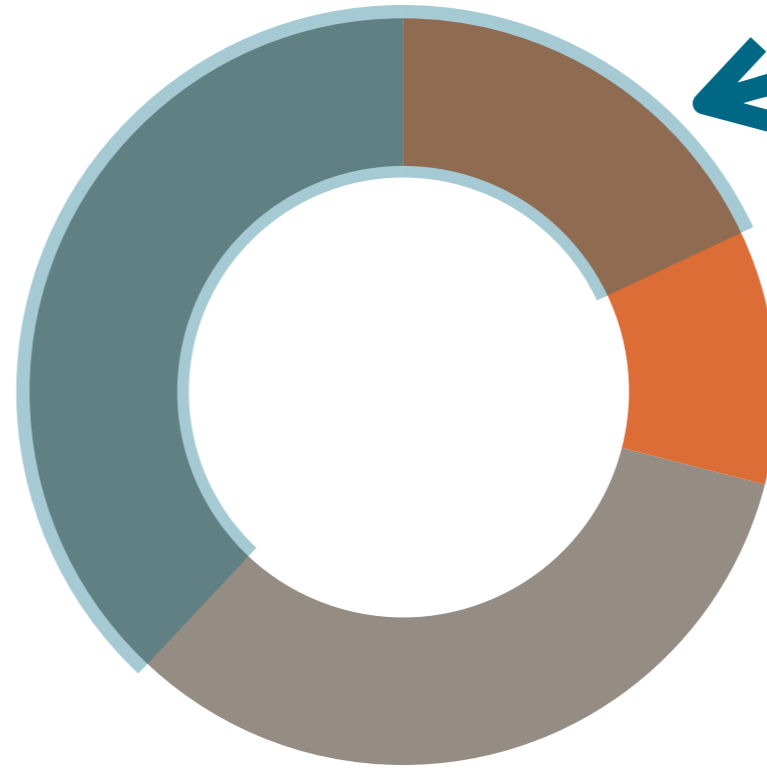


**480,000**  
ARE PEOPLE OF  
COLOR

# REGIONAL DEMOGRAPHIC PROFILE



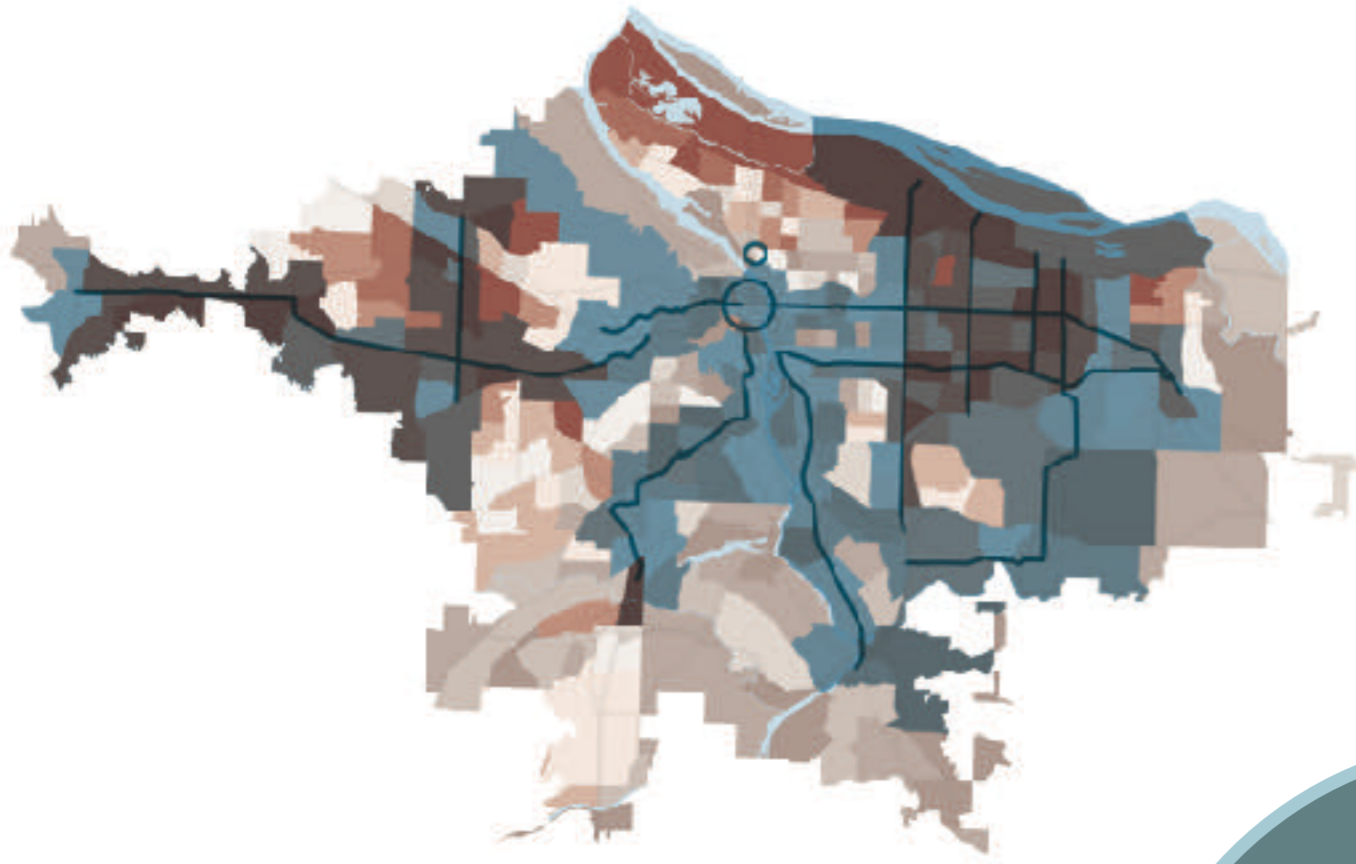
**1.67M**  
PEOPLE LIVE IN  
THE METRO  
AREA



**56%**  
OF THE REGION LIVES IN  
THE GET MOVING 2020  
INVESTMENT AREA

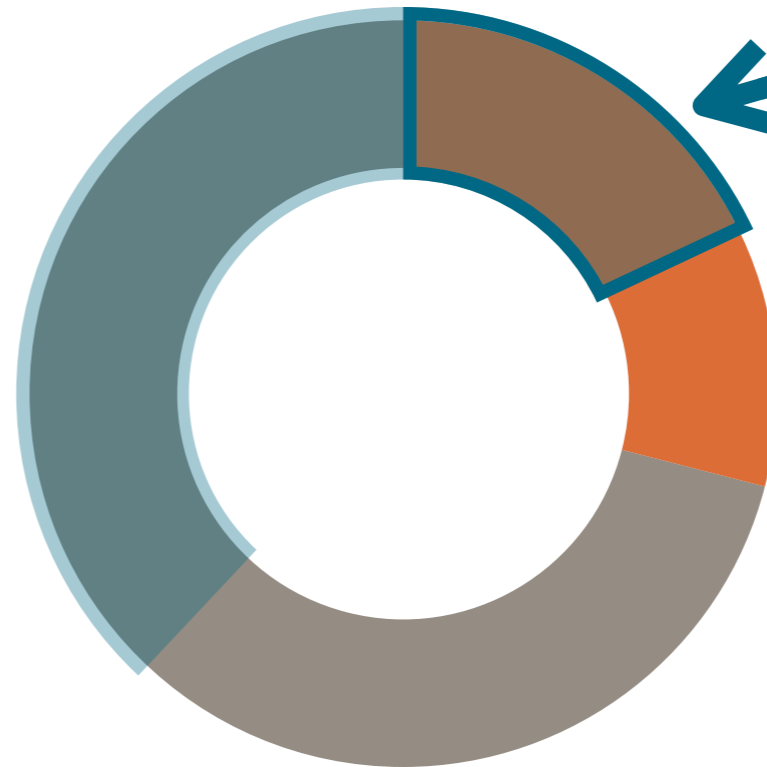
**480,000**  
ARE PEOPLE OF  
COLOR

# REGIONAL DEMOGRAPHIC PROFILE



**1.67M**  
PEOPLE LIVE IN  
THE METRO  
AREA

**63%**  
OF THE REGION'S PEOPLE OF  
COLOR LIVE IN THE GET MOVING  
2020 INVESTMENT AREA

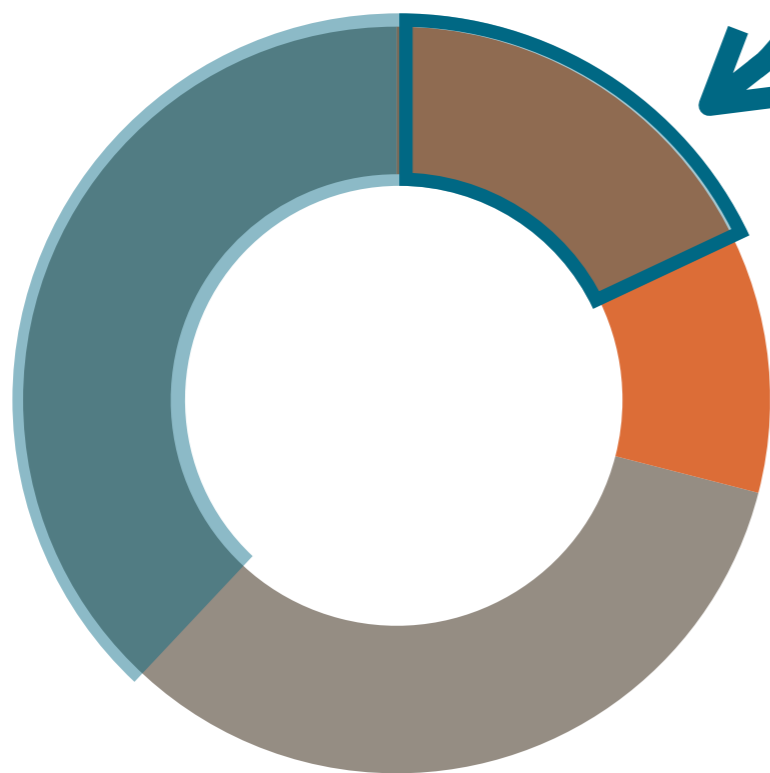


**480,000**  
ARE PEOPLE OF  
COLOR

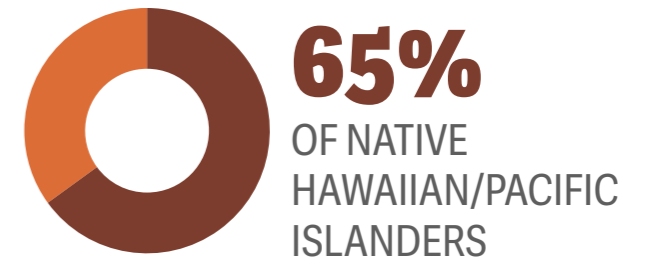
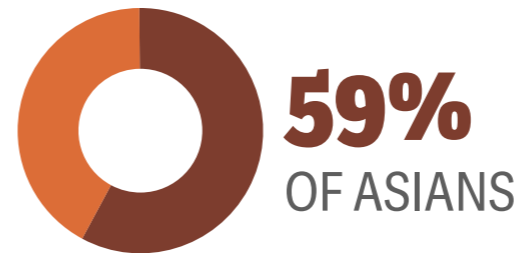
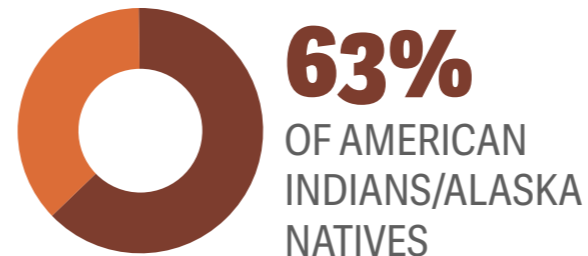
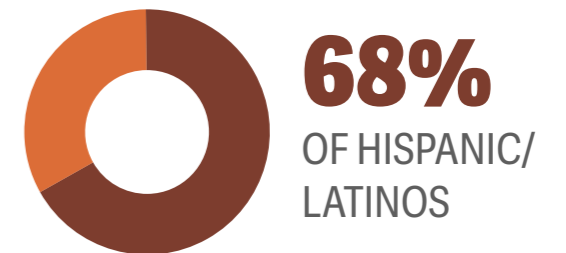
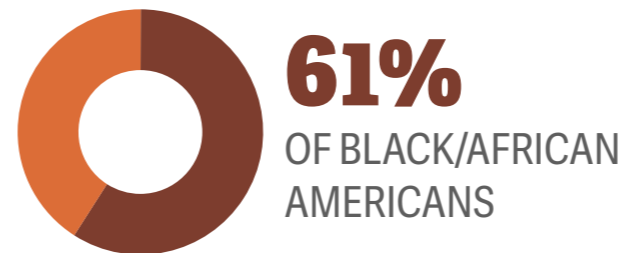


# REGIONAL DEMOGRAPHIC PROFILE

**63%**  
OF THE REGION'S  
PEOPLE OF COLOR LIVE  
IN THE GET MOVING 2020  
INVESTMENT AREA



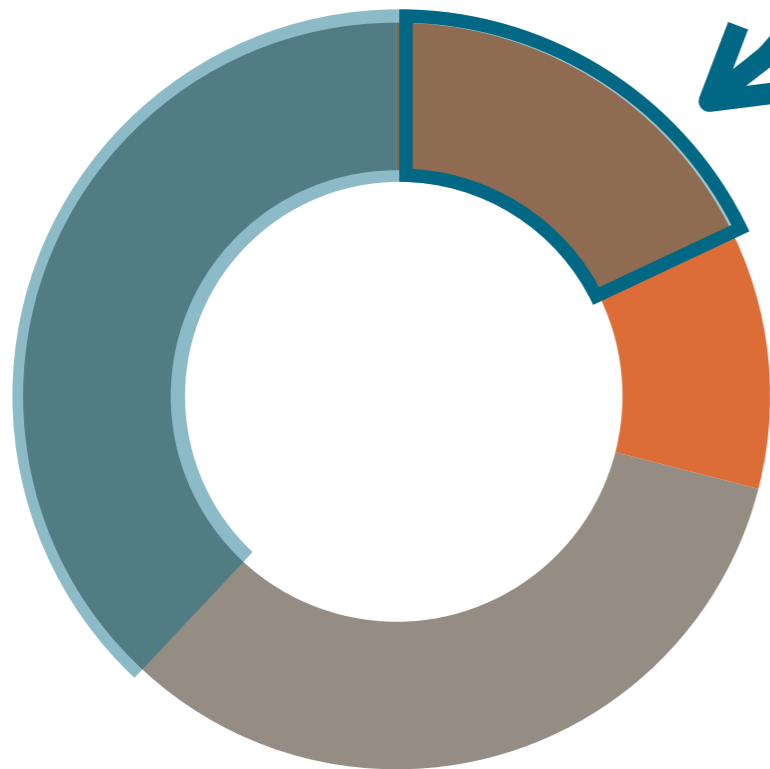
## Percent of population living in investment area by race\*:



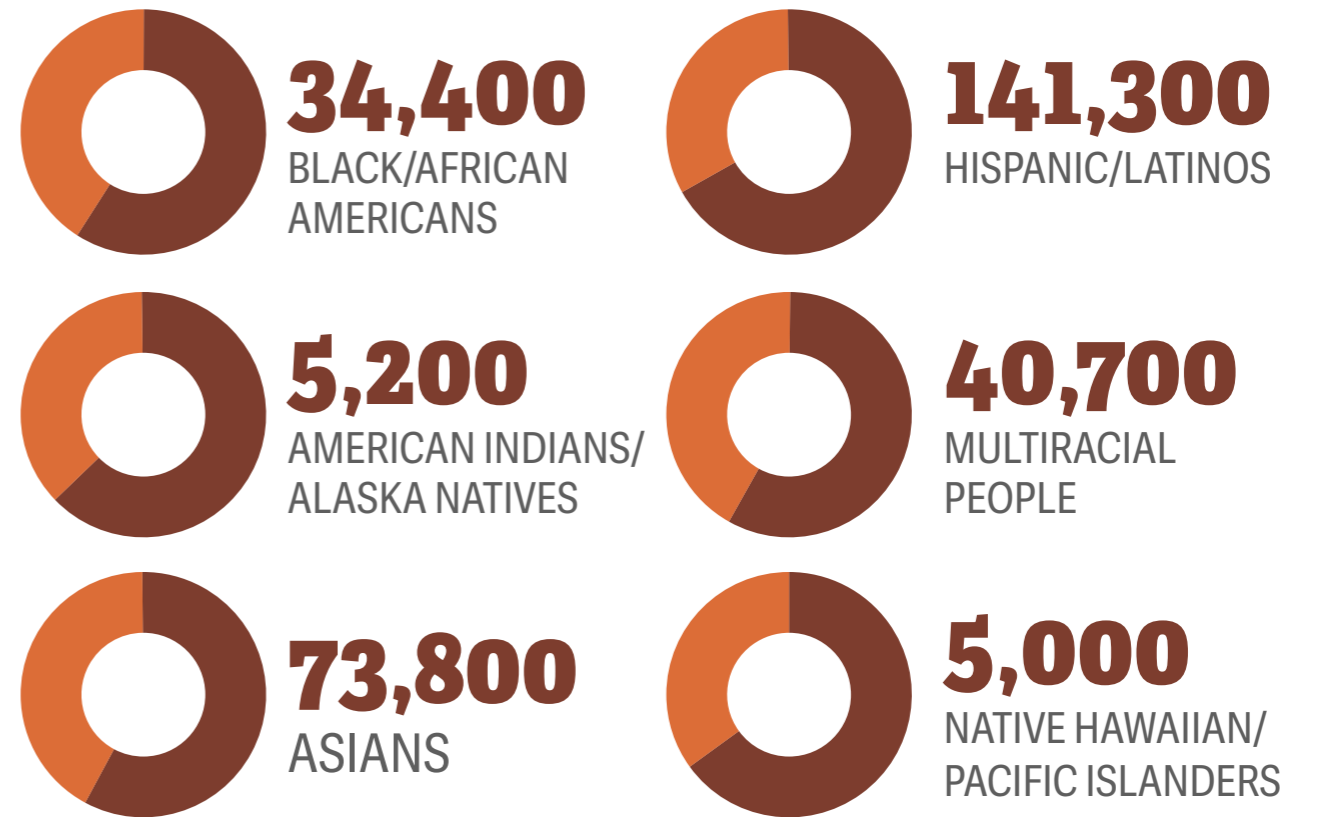
\*Race and ethnicity groups as defined by the US Census

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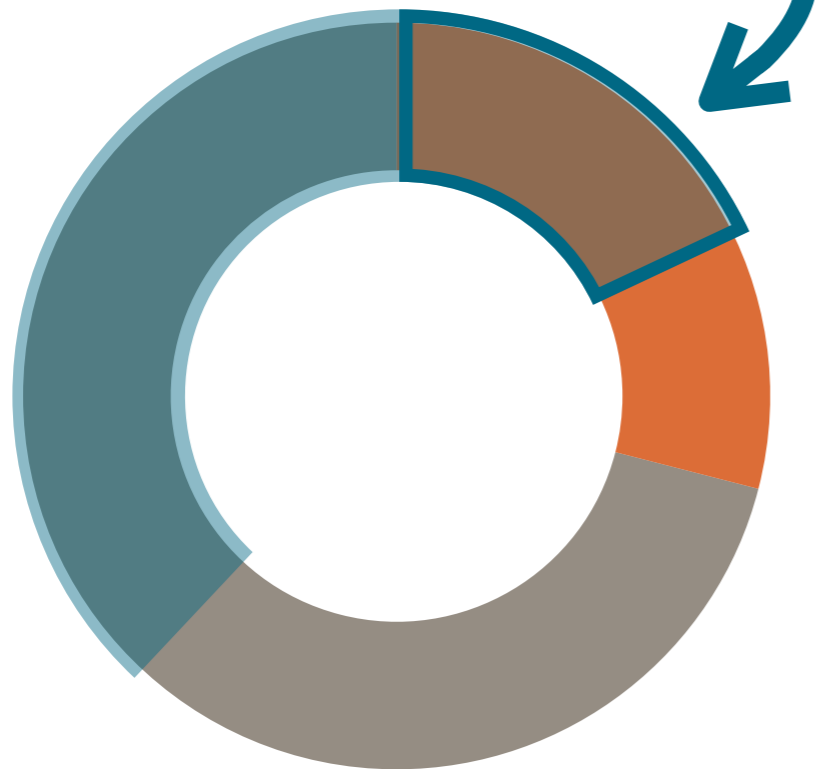
## Size of POC populations\* living in investment area:



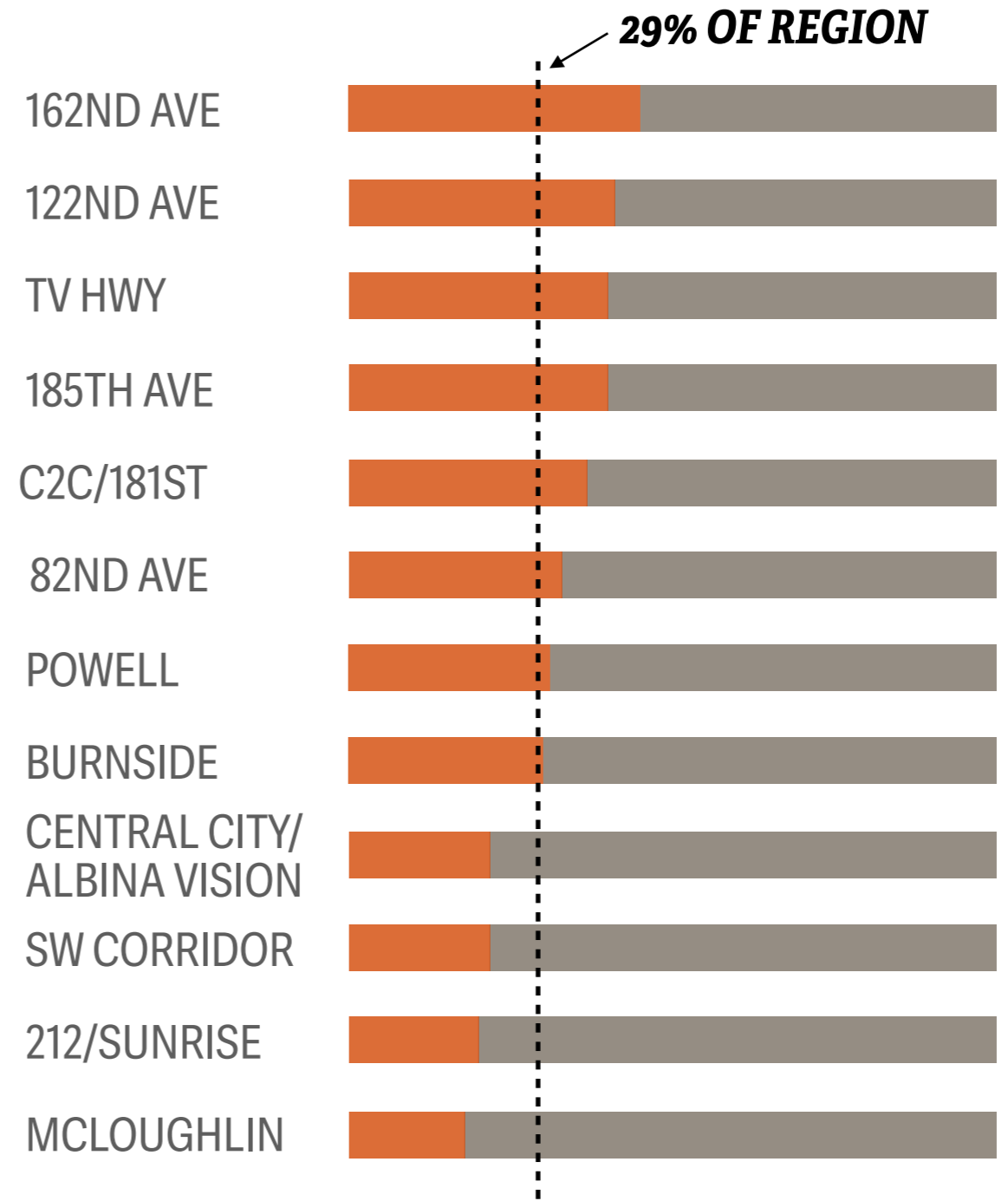
\*Race and ethnicity groups as defined by the US Census

# REGIONAL DEMOGRAPHIC PROFILE: TIER 1 CORRIDORS

**63%**  
OF THE REGION'S  
PEOPLE OF COLOR LIVE  
IN THE GET MOVING 2020  
INVESTMENT AREA



## Percent of corridor population who are people of color:



**Get Moving 2020 Tier 1 investments demonstrate intentional investment in areas where people of color live.**

**Specific equity outcomes and accountability mechanisms are needed to realize potential benefits.**

**Proposed next steps:**

- **Corridor level analysis**
- **Racial equity outcomes – further engagement**
- **Equity strategies and accountability mechanisms**
- **Project refinement and implementation**

# Council discussion

Does Council have questions about these analyses?

Does Council have initial thoughts on setting goals and mechanisms to advance racial equity outcomes through measure implementation?



# Timeline update: Highlights

**March**

**Council work sessions:**  
**3/10 & 3/17**

Tier 1 questions  
Measure structure

**Task Force**

3/4: Regionwide  
programs

3/18: Tier 2 Corridors  
Feedback

**Engagement**

Regionwide programs  
Forums, Survey  
Community Partners

**April**

Staff Programs  
Recommendation

**Council work sessions**

4/7: Tier 2 corridors

4/14: Programs

4/28: Reconciliation

**Task Force**

**4/1 & 4/15**

Oversight &  
Accountability

Final input to Council

**May**

**Council work sessions**

Finalizing measure  
package, oversight &  
accountability

**Final engagement**

**Late May:**

Council referral  
decision

DRAFT – Subject to change

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**getmoving2020.org**

