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Metro Equity Inventory Report

Section 1 | Findings & Recommendations

June 2012

About Metro

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

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INTRODUCTION AND BACKGROUND

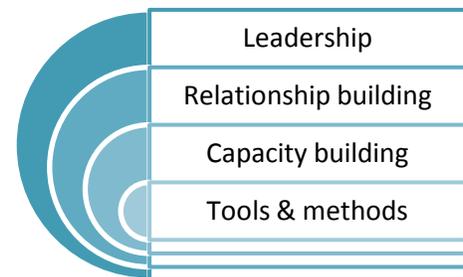
The equity inventory report provides a snapshot of how Metro intentionally incorporates equity considerations into agency activities. The inventory is intended to provide Metro staff and community stakeholders with information on how Metro currently considers equity. In addition, the inventory can serve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

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

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

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

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



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

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

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

REGION’S 6 DESIRED OUTCOMES

Vibrant communities

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

Economic prosperity

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

Safe and reliable transportation

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

Leadership on climate change

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

Clean air and water

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

Equity

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

IDENTIFYING THE CHALLENGE

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

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

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

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

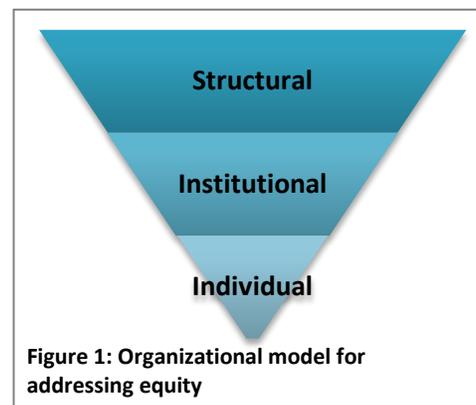


Figure 1: Organizational model for addressing equity

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

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

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

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

Why focus on institutional racism?

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

What about people experiencing multiple oppressions?

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

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

PROJECT APPROACH

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

Phasing

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

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

The outcomes of Phase 1 are:

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

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

The overarching deliverables of all three phases include:

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

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

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

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

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

Cross-departmental inventory

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

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

In addition to collecting information on internal equity focused efforts, project staff brought on an Oregon Fellowship intern in the summer of 2011.¹ This additional capacity provided the support needed to conduct a preliminary scan of local and external approaches to developing equity principles and/or frameworks. Information was collected through either in-person meetings or via phone interviews. This work provides valuable background and context for Metro as this work moves forward. The contacts and relationships made through these interviews introduced this work to external partners and provided an important first step as Metro engages in community dialogue on equity approaches.

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

FINDINGS

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

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

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

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

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

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

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

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

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

Barriers

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

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

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

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

Limitations

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

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

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

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

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

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

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

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

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

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

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

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

Implementation considerations

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

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

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

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

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

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

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

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

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

Role of leadership

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

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

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

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

Opportunities

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

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

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

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

RECOMMENDATIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 1: Metro equity inventory recommendations and findings

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

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

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

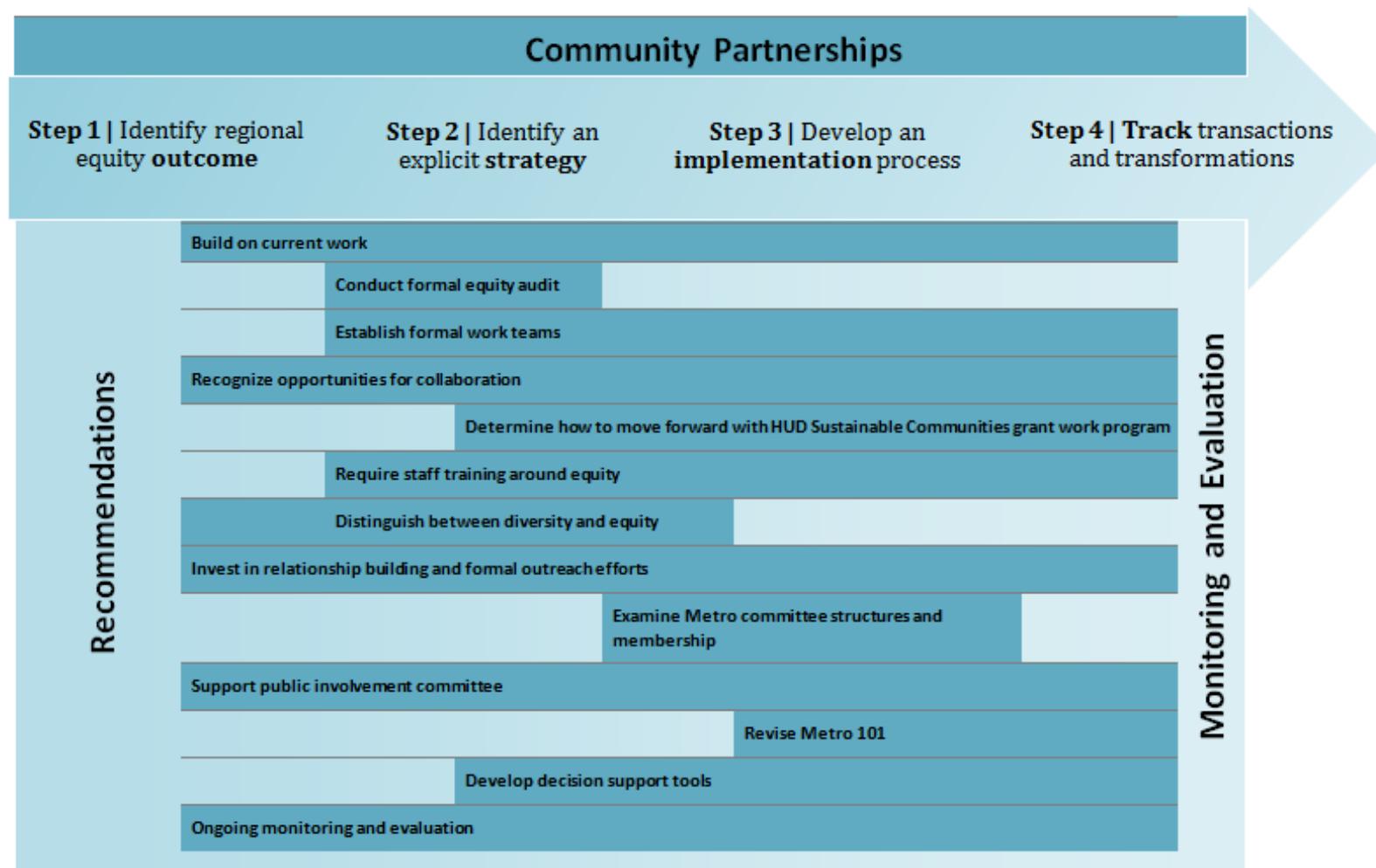
6 Determine how to move forward with HUD Sustainable Communities grant work program	Lack of agency strategy (Limitation)	The HUD Sustainable Communities grant process represents significant effort, both internally and externally, to better advance regional equity issues. This work can help inform aspects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

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

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

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

Figure 2: Recommendation sequencing, conceptual framework



Section 1 | Findings and Recommendations

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