



Metro Equity Strategy | Project Proposal

Background and purpose

In 2010, the Metro Council adopted equity as one of the region's six desired outcomes and in 2011 directed Metro leadership and staff to initiate the development of an organizing framework that would consistently incorporate equity into Metro policy and decision making. Given the scale of effort needed to strategically move Metro's equity work forward, project staff designed a three-phase approach to developing an Equity Framework for Metro. This approach provides the strategic guidance and support needed to advance equity as one of the region's six desired outcomes.

Metro's *Equity Inventory Report* Phase 1 of Metro's Equity Framework process, (completed June 2012) identified four areas for improvement:

- Lack of strategic guidance to support intentional efforts to advance equity
- Duplication of effort in the area of equity
- Inconsistency of approach to equity considerations
- Lack of capacity to advance this regional outcome throughout the agency

In response, the purpose of Phase 2 (*Defining a Strategy*) is to launch an engagement process that will articulate an agency-specific strategy for advancing equity within the context of Metro's roles and responsibilities.

The strategy should align with the original intent of the regional outcome and provide additional detail and clarity on what it means to ensure that the benefits and burdens of growth are distributed equitably across the region.

Such a strategy will increasingly guarantee that Metro leadership and staff members consider equity at the beginning phase of policy, program, or project development, ensure actions are taken and evaluation measures are set. While defining a strategy should not take place without meaningful external stakeholder partnerships, the focus of the strategy needs to deliberately build capacity within the agency to advance equity within the context of Metro's roles and responsibilities. After completing Phase 2, staff will make a recommendation regarding implementation of an *Equity Action Plan* (Phase 3 of the process).

A Case for Equity

Metro's tagline—*Making a great place*—provides the context for the agency's role in advancing equity. Metro works with communities, businesses and residents to create a vibrant and sustainable region *for all*.

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation or recreation choices for people and businesses in the Portland region. To achieve these outcomes, Metro provides planning, policy, and services to preserve and enhance the region's quality of life.

While the Portland Metropolitan Region is a leader in urban policy, there is evidence that the benefits and burdens of growth are not equitably distributed to all residents of our region.¹ Data show starkly disparate patterns of poverty, home ownership, educational achievement, air quality, childhood obesity, and access to parks between communities in the region.² These conditions, if not addressed, will worsen in the face of changing demographics and population growth.

Equity issues transcend city, county and special district jurisdictional boundaries. Metro's larger service district is well positioned to support the development of a common language and framework for advancing equity. Through its mission of preserving and enhancing the quality of life and environment for current and future generations, Metro can work to increase and improve opportunities for underserved communities. Bringing equity into the forefront of our work will help to secure our region's future by creating a place where everyone has the opportunity to contribute. By building the capabilities of all our region's residents we can create the conditions that allow all to flourish and ensure increased prosperity throughout the region.

Metro can play an important role by creating a shared definition and understanding of equity; providing strategic guidance through an agency strategy; and by ensuring consistent internal efforts, capacity and knowledge.

Deliberate strategies are required to address inequities and achieve change. Pursuing the outcome of equity may require changes in the way policy and investment decisions are made and how services and programs are delivered. Metro cannot predict what changes may be necessary and cannot advance equity by working alone. The best way to begin is to ask the important questions and build authentic relationships with partners.

Staff recommends that Metro develop an agency-specific equity strategy, using a process that can:

- Build on the existing agency efforts to advance equity
- Guide the identification of barriers to fair practices that inhibit the development of equitable communities
- Focus on the institutional structures that stand in the way of equitable outcomes

Developing an equity strategy

Metro already has undertaken efforts to advance equity across the agency, however in absence of an organizing framework or strategic direction, the agency is faced with a number of challenges and limitations in this area.

Despite current limitations, the agency has a foundation to build on while undertaking efforts to strategically advance equity as a regional outcome. Building on this foundation, Metro's *Equity Inventory Report* and feedback and input from our partners, Metro staff created a process frame for developing an agency-specific equity strategy. In recognition that the process of developing an

¹ Coalition of Communities of Color Presentation to the Multnomah County Board of Commissioners, March, 2010.

² The Path to Economic Prosperity: Equity and the Education Imperative. *Greater Portland Pulse*. P. 13.

equity strategy needs to be built on a foundation of partnership and the strengthening of relationships with community partners, the work plan for this process will be developed in partnership with stakeholders.

The following framework provides context for the questions that need to be answered to create an equity strategy as well as how the related deliverables will guide Metro's work. The summary below provides an overview of the required steps, with additional detail on interim deliverables and outputs for Step 1.

Guiding Frame: Equity Strategy process

Research Question 1 | Within the regions six desired outcomes, what are the regional inequities and where are there disparities?

Major process elements

1. **External collaboration and partnership:** Establish a "coalition" of stakeholders to collaborate with Metro throughout the entire strategy development process.
2. **Internal engagement:** Establish an internal coordination and engagement plan to build on existing efforts.
3. **Relate existing indicators to regional outcomes and identify data and measurement gaps:** Identify how existing and new equity indicators can be used to develop an equity lens for the region's desired outcomes.
4. **Develop and apply an equity lens:** Partner with "coalition" members to define the relevant and appropriate equity measures to identify disparities across the region's desired outcomes. Identify the structural nature of these inequities.

Deliverable: An *Equity Baseline* for each of the region's five outcomes aside from equity. By engaging with stakeholders and community partners Metro will develop an equity lens for each of the region's desired outcomes; this equity lens will provide measurable equity indicators that serve as the foundation for a fact-based approach to identifying priorities for Metro's equity strategy.

Research Question 2 | How do Metro's roles relate to the inequities that exist across the region's desired outcomes; what is the relationship of Metro's roles to these disparities?

Major process elements

1. **Convene an internal work team:** Collect information from across the agency to identify Metro's relationship to the disparities across the region's desired outcomes.
2. **External engagement on the Equity Inventory:** Building on the Equity Inventory Report, identify any additional issues with Metro's current process to advance equity.
3. **Develop a prioritization approach:** After documenting the relationship among the 'outcome inequities' and Metro's roles, identify how to prioritize the agency's efforts to advance equity.

Deliverable: A *Relationship Map* that identifies Metro's connection to the inequities documented in the Equity Baseline. It is anticipated that across each of the desired outcomes there will be some equity issues Metro can affect directly; issues where Metro only has an indirect relationship; and other issues where Metro has little or no influence or leverage.

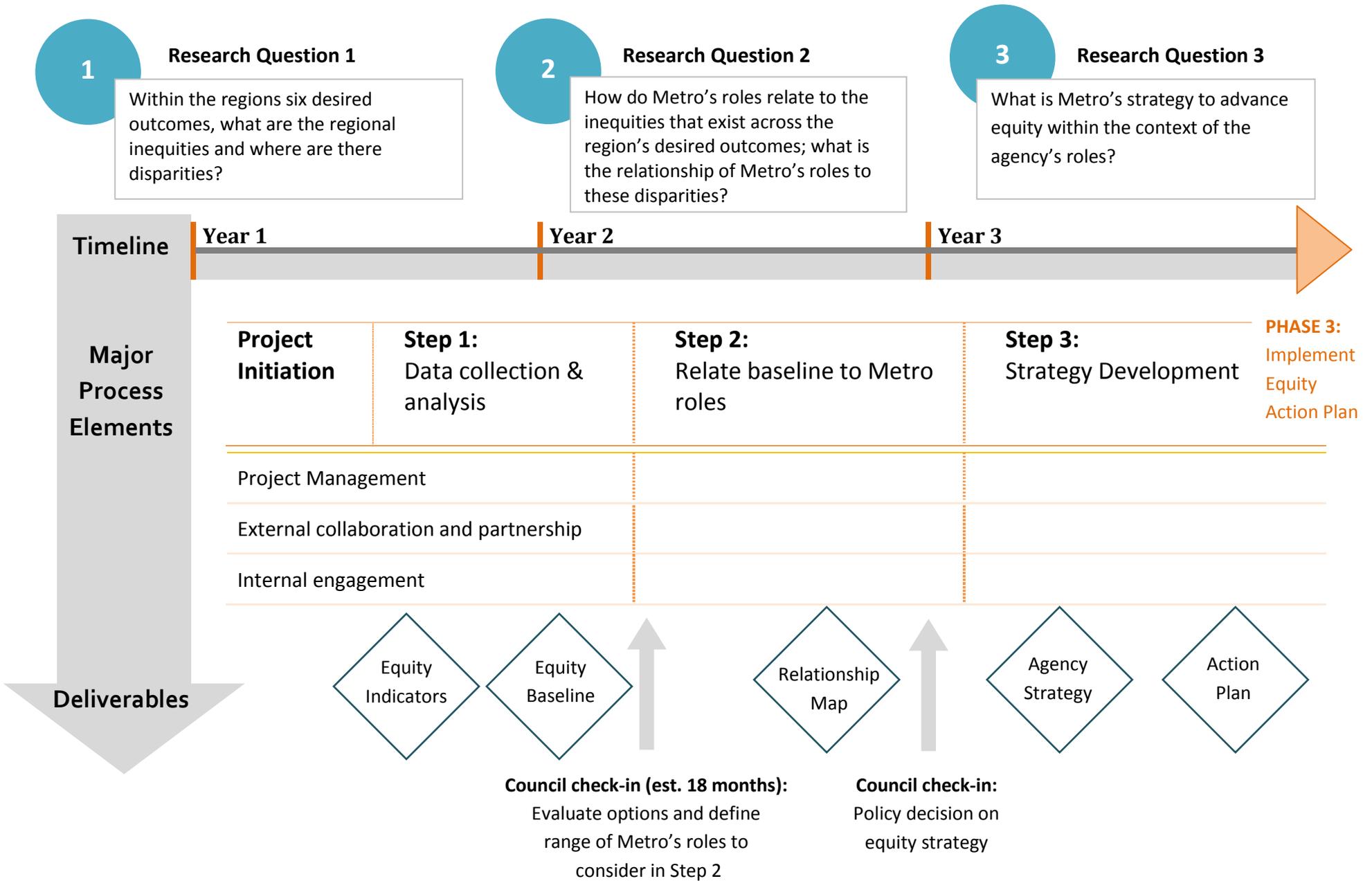
Research Question 3 | What is Metro's strategy to advance equity within the context of the agency's roles?

Major process elements

1. **Implement prioritization approach:** Identify the agency-wide equity strategy that will best address existing inequities within the context of Metro's functions.
2. **Agency Equity Strategy:** Develop and adopt an agency-wide equity strategy policy.
3. **Implementation Plan Scope:** Develop and adopt a scope of work to develop an *Equity Action Plan*.
4. **Invest in implementation:** Pursue resources to support implementation of the equity implementation plan.

Deliverables: Agency-specific Equity Strategy Policy and an Equity Action Plan. Based on the findings of Steps 1 and 2, prioritize Metro's approach for advancing equity relative to the inequities most directly related to Metro's roles. The equity issues most directly influenced by Metro (as defined by the *Equity Baseline* and the agency's *Relationship Map*) should define the agency's strategy for advancing equity.

Upon completing Phase 2 (*Defining a Strategy*), it is intended that Metro undertake Phase 3 (*Implementing the Strategy*).



Equity Strategy budget estimate

Project steps	PROJECT INITIATION & STEP 1	Finalize Step 1 & STEP 2 (range estimates)	STEP 3 & EQUITY ACTION PLAN (range estimates)
Timeline	Year 1	Year 2	Year 3
Staff confidence		50%	25%
Budget amendment (<i>new</i>)	\$300,000		
Leverage current efforts (existing)	\$110,000		
Sub-total	\$410,000	\$170,000 - \$300,000	\$125,000 - \$350,000
Total Range estimate			\$705,000 - \$1,060,000
<i>Timeline and total cost is dependent on scope and scale of effort. Estimates for Steps 2 and 3 are less accurate given dependencies on the outcome of Step 1.</i>			

Total year 1 budget amendment	\$300,000
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Step 1 concept details

The **purpose** of Step 1 of the *Equity Strategy* process is to create an evidence-based engagement process that will serve as the foundation of Metro’s continuing equity work.

The **objective** is to answer Research Question 1: Within the regions six desired outcomes, what are the regional inequities and where are there disparities?

The **deliverable** of Step 1 is an Equity Baseline for each of the region’s five outcomes, aside from equity. This Equity Baseline will provide:

- ✓ An organizing framework that will define how to evaluate progress at advancing equity across the region and across issues over time
- ✓ An agency definition of “Equity” as it relates to the region’s six desired outcomes
- ✓ A series of community supported equity indicators that can inform regional decision-making

In addition, Step 1 seeks to provide the following **interim deliverables or process outputs**:

1. *Strengthen new partnerships*

Community partners have provided Metro staff and leadership feedback that the agency’s current engagement strategy has taken a one-off approach in regard to equity issues. Community partners have also indicated the desire to work with Metro on developing an organizing framework for how to evaluate equity as a regional outcome. Step 1 of the *Equity Strategy* process responds to this feedback and provides an opportunity to develop a collaborative partnership to advance equity.

2. *Build on existing strengths and efforts*

Step 1 will also build upon Metro’s existing strengths and efforts to advance equity and will support a number of the agency’s existing and planned activities. These include, but are not limited to the following:

Existing efforts

- Title VI Compliance: Collaboration on data collection and analysis needs; enhanced opportunities to coordinate and benefit from relationship-building with key community stakeholders in equity, diversity and environmental justice. Development of longitudinal data sets that can be used to track progress over time.
- Metro’s Diversity Program: Enhanced opportunities to coordinate and benefit from relationship-building with key community stakeholders in equity, diversity and environmental justice.
- Climate Smart Communities Scenarios and Southwest Corridor projects: Provide a two-way learning opportunity in the development of equity evaluation criteria that can inform *regional decision making*.
- Natural Areas Levy: Provide a two-way learning opportunity in the development of equity evaluation criteria that can inform *service provision and investment decisions*.
- Community Investment Initiative: Provide a two-way learning opportunity in the development of equity evaluation criteria that can inform *infrastructure investment decisions*.

Planned efforts

- Urban Growth Report: Provide an equity benchmark upon which to evaluate future land use and growth management decisions.

- Regional Transportation Plan updates: Provide an equity benchmark upon which to evaluate future transportation investment and management decisions.
- Diversity Action Plan Core Area 2 (employee recruitment and retention): Inform potential enhancements or adjustments to the recruitment and retention practices during the program assessment process.

An interim deliverable from this internal coordination effort will be to develop a cohesive story, or context, for how Metro's existing efforts incorporate equity. This information will identify current strengths and highlight "promising practices" to build on.

3. Build internal capacity around equity

By collaborating with a broad range of community partners in the *Equity Strategy* process, Metro staff will benefit from the breadth and depth of knowledge that our regional partners have around equity. By engaging in an open dialogue around the diverse equity perspectives throughout the region, Metro is also well positioned to help facilitate a regional dialogue among communities and across perspectives.

4. Coordinate with and support Metro's diversity program

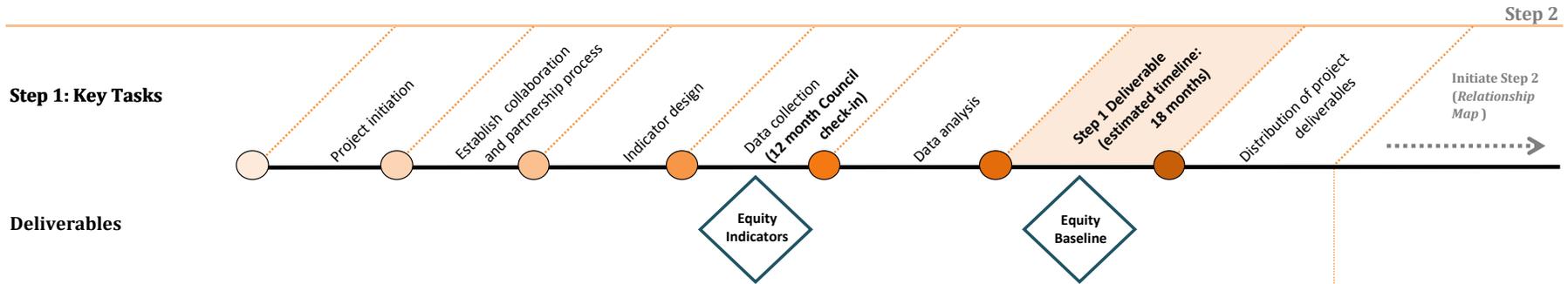
Because the Diversity Program addresses a number of Metro's most centrally controlled roles, the program not only supports Metro's effort to advance equity, but also ensures the long-term success of a strategic agency-specific equity strategy. This is not to say that Metro's equity strategy should not also address these central roles, but that Metro is already committed to, and making advancements in these areas. Developing an equity strategy would not only support these efforts, but also provide a strategic direction for the agency's responsibilities that extend beyond these centrally controlled areas.

5. Comparables to other areas

When developing equity indicators for each of the Region's Desired Outcomes (aside from Equity) Metro and partners can draw from a large body of existing work, including but not limited to: The Greater Portland Pulse, Metro and other partners' Opportunity Mapping efforts, the Regional Equity Atlas project and other regional indicator efforts. In addition, Metro and partners can draw from the work of other regions and communities. Through this process, the region can also identify indicators that will allow comparisons of our progress, relative to other communities.

6. Foundation for Step 2 of the Equity Strategy process

Lastly, Step 1 will provide a strong foundation to examine and define Metro's role—as an agency—in advancing equity across the region's desired outcomes (Step 2). By engaging with stakeholders and community partners Metro will develop an equity lens for each of the region's desired outcomes; this equity lens will provide measurable equity indicators (12 month deliverable) that serve as the foundation of the Equity Baseline (18 month deliverable). By developing the Equity Baseline Metro and partners will establish a fact-based approach to identifying Metro's Equity Strategy.



Internal coordination efforts and interim outputs

Current efforts

Title VI Limited English Proficiency Plan	Coordinated relationship building & engagement efforts	Inform data collection and coordination efforts	Coordinate on relevant data collection process
Diversity Program			
Natural Areas Levy		Two-way learning opportunity based on stakeholder input and technical expertise	Coordinated evaluation measures; including technical methods
CSC Scenarios & SW Corridor projects			
Community Investment Initiative			

Planned efforts - illustrative examples

Functional Plan Review	Equity evaluation framework for future land use and growth management decisions
UGR Update	Equity evaluation framework for future transportation investment and management decisions
RTP Update	Equity evaluation framework to inform program effectiveness during assessment process
Diversity Action Plan Core Area 2 (employee recruitment and retention)	