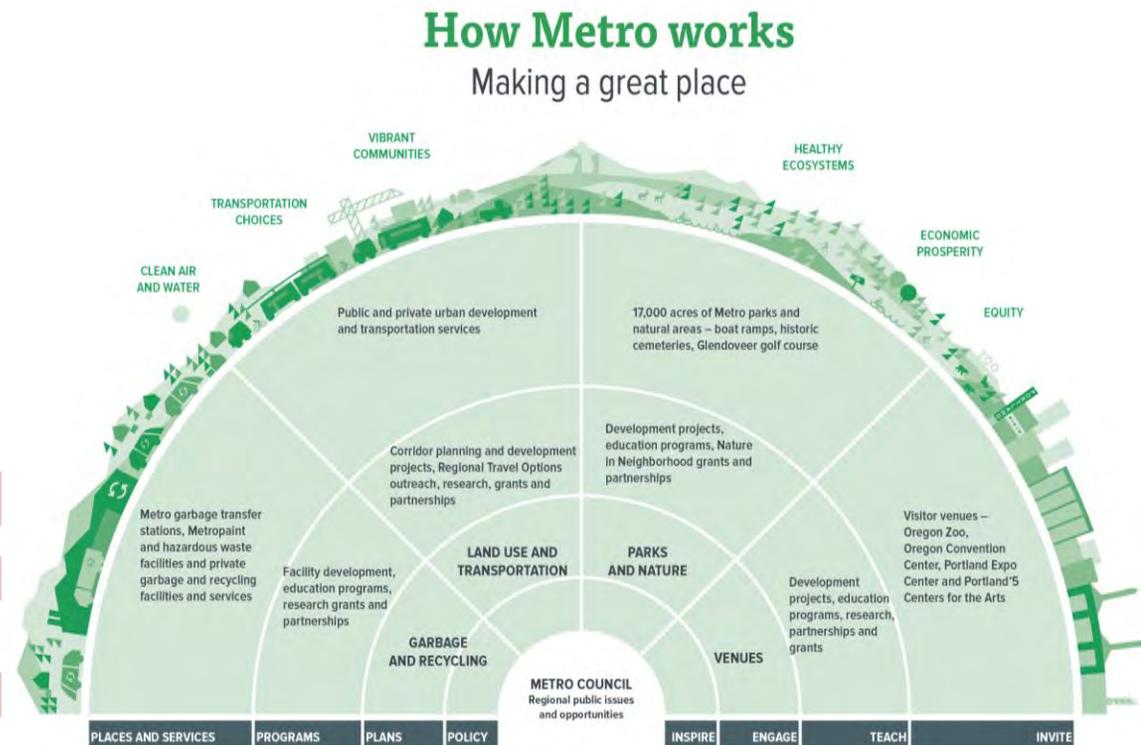


APPENDIX A - BACKGROUND OF METRO'S COMMITMENT TO ADVANCE EQUITY

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

Metro is governed by the Metro Council, a nonpartisan group of seven elected representatives who work together with 25 cities, three counties and numerous community leaders and constituents on long-range plans and programs that cross city and county boundaries to create a vibrant Portland region.

Metro has four major lines of business where the agency has influence to impact the quality of life for the residents of the Portland metropolitan region: Garbage and Recycling, Land Use and Transportation, Parks and Nature, and Venues. The policies, plans, programs and services that stem from these four business lines provide an immense opportunity for Metro to advance equity through its own direct authority or by acting as a regional convener.

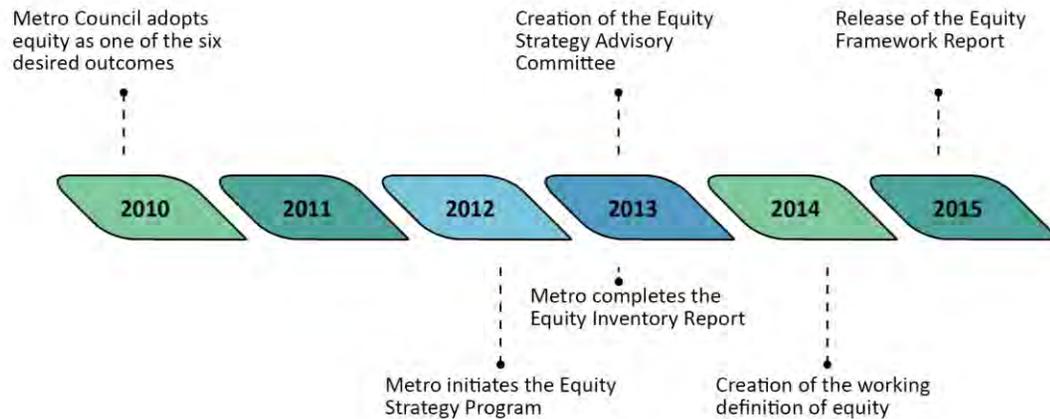


Metro staff and leadership acknowledge that in spite of our region’s world-renowned reputation for smart growth, sustainability, transportation choices, natural beauty and economic vitality, some communities are being left behind – and have been for many years. To address these persistent disparities, Metro is committed to action.

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

In 2012, Metro initiated the Equity Strategy Program, with the objective of creating an organizing framework to help Metro consistently incorporate equity into policy and decision-making. The most significant program accomplishments to date include:

- the completion of the Equity Inventory Report, which catalogued the existing equity-related activities throughout Metro’s departments
- the creation of the Equity Strategy Advisory Committee, a group of external stakeholders who provide input to the Metro chief operating officer and staff regarding the implementation of the equity strategy
- the investment and creation of the Diversity, Equity and Inclusion Program, which demonstrates Metro’s priority to advance diversity, equity and inclusion and establishes a formal group to strategically coordinate and guide such efforts within Metro
- the release of the Equity Framework Report, commissioned by Metro and prepared by six community-based organizations.



Inventory of Metro's equity efforts

To continue the deliberate advancement of equity in the region after the adoption of the six desired outcomes, Metro invested in creating an [Equity Inventory Report](#). Completed in June 2012, the inventory, deemed the first step towards developing an agency-wide equity framework, assessed how Metro was approaching equity already.

The inventory found that Metro was engaging in many efforts to advance equity throughout the region. The inventory included 22 specific activities where Metro intentionally incorporated equity considerations into its practices.

But the inventory also showed that these efforts lacked a strategic, unified direction and guidance, creating inconsistencies of approach as well as staff capacity challenges to advance equity.

To intentionally and strategically advance equity throughout the region, the Equity Inventory Report's main recommendation was for Metro to create an equity strategy using an extensive external and internal engagement.

Creation of the Equity Strategy Advisory Committee

The next big step was the creation of the Equity Strategy Advisory Committee (ESAC). This is a group of external stakeholders identified through an open application process, and appointed by the Metro chief operating officer to advise Metro staff on the creation of this Strategic Plan and other equity-related issues.

The original 12 members of ESAC were appointed in July 2013. After five members left the committee due to unforeseen circumstances, a second group of ESAC members were appointed in November 2015, bringing the number of members to 16. Current members include people who work for partner jurisdictions, the business sector, educational institutions and nonprofits. They share a commitment to advancing equity in the Portland metropolitan region and an interest in helping Metro succeed in its efforts.

ESAC's activities to date include:

- oversight of the Equity Framework Report creation

- creation of Metro’s working definition of equity
- recommendations on how to proceed with the development of this Strategic Plan
- active participation in community and staff engagement efforts
- input and oversight on the creation of this Strategic Plan

A working definition of equity

In 2014, ESAC created a working definition of equity that continues to guide Metro in its strategic effort to advance equity throughout the region.

Metro’s working definition of equity reads:

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

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

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

Equity Baseline Workgroup and Equity Framework Report

Completed in January 2015, the [Equity Framework Report](#) was a community-led report resulting from a yearlong collaborative effort conducted by six local community-based organizations: Adelante Mujeres, Asian Pacific American Network of Oregon, Center for Intercultural Organizing, Coalition for a Livable Future, OPAL – Environmental Justice Oregon and the Urban League of Portland. These organizations, collectively known as the Equity Baseline Workgroup, were selected competitively to work under contract with Metro staff to identify, inventory, classify and recommend quantitative and qualitative evidence-based indicators and corresponding data sets that measure the varying degrees by which people experience equity and inequity in our region.

The Equity Baseline Workgroup initially determined that the development of evidence-based indicators and data that could assist in measuring regional equity was a premature step in the creation of Metro’s Strategic Plan. The workgroup stressed that an effective strategic direction first required a keen understanding of the historical and current community needs that Metro seeks to address. From such a foundation, Metro can better track future trends and assess the impact of its public policy work. The workgroup also highlighted the importance of an honest assessment of internal Metro policies, programs and services, and their corresponding investments and infrastructure practices that may either have helped advance or further hindered progress in achieving equitable outcomes. To objectively recognize these challenges, the workgroup said, it was important for Metro to engage diverse community members and their representatives as front-line “experts” to convey the lived experience of residents, interpret the most critical regional equity-related needs and formulate recommendations to inform the creation of a useful equity strategy.

With the support of Metro staff and the Equity Strategy Advisory Committee, the Equity Baseline Workgroup changed their product from baseline indicators and data to focus on creating a framework report to provide the necessary foundation of historical and community needs, as well as the structure to advance an assessment of internal policies, programs and services. The group’s work also included inventorying over 300 datasets and potential regional indicators of equity and identifying and defining 10 indicator categories, each with its own associated potential data points, and relating them to Metro’s level of authority and influence.

The Equity Baseline Workgroup presented three major recommendations within the Equity Framework Report:

1. Metro should use a racial and economic justice-based approach in its equity strategy in order to adequately take into account equity's social, political, environmental, and economic dimensions.
2. Metro should recognize that equity and the other five desired regional outcomes cannot be segregated from one another or discussed in isolation. Equity is unique among these desired outcomes because it is fully integrated into the other five. For Metro to meaningfully improve the other five outcomes at the regional level, it must improve equity. Likewise, in order to meaningfully improve equity, Metro must improve the other five outcomes. Therefore, the workgroup recommended that Metro reframe the six desired regional outcomes as the "Equity +5" desired regional outcomes.
3. Metro should utilize the established 10-indicator framework to complete a community-led internal equity assessment. This assessment would present the foundational information needed for Metro to more fully understand its roles and responsibilities to advance equity in the region and the authority that it has to impact the disparities faced by the most vulnerable communities. For Metro to succeed in reaching its equity goals, Metro should commit to making internal and institutional changes that reduce these disparities, where Metro has the authority and influence to do so.

The Equity Framework Report and its recommendations were submitted to the Equity Strategy Advisory Committee for review and discussion.

Equity Strategy Advisory Committee guidance

ESAC supported most of the recommendations presented in the Equity Framework Report, including the adoption of a racial and economic justice lens to guide Metro's work and the implementation of a collaborative community effort to do an in-depth assessment of Metro's policies, programs, services and authority. The committee developed and submitted a memorandum to Metro's chief operating officer with their formal recommendations.

Following the receipt of ESAC's memo, the chief operating officer approved an agency direction to advance the main conclusion of the Equity Framework Report: Build a strategy that advances equity at Metro in the short- and long-term and focuses on improving outcomes for communities of color and low-income residents of the region.

Racial equity approach selection

The DEI team selected the Center for Social Inclusion (CSI) as the consulting team to support the creation of this Strategic Plan. CSI staff have extensive experience working with local jurisdictions around the country in the development of equity strategies. Together with the Haas Institute at the University of California, Berkeley, CSI founded the Government Alliance on Race & Equity, a coalition of local government entities that work on advancing equity.

Part of CSI's scope of work was to research national best practices and examples of the implementation of equity by government entities. Research by the DEI team and CSI showed that all government entities working to advance equity in the United States are adopting the racial equity approach: focusing on removing barriers for people of color to achieve better outcomes, which in turn helps remove barriers for all other disadvantaged communities.

The DEI team presented these findings to the Metro Council in July 2015, and councilors agreed with the staff recommendation of using the racial equity approach as the foundation of this Strategic Plan.

APPENDIX B: CULTURALLY SPECIFIC COMMUNITY ENGAGEMENT FINDINGS – ROUND 1

Key stakeholders

Between April 15 and July 15, Metro Council and Metro staff engaged 50 key stakeholders in conversations to help shape the development of the equity strategy and action plan. Stakeholder conversation goals:

- **Ensure that key stakeholders understand** Metro’s equity strategy and action plan purpose, the recommendations and direction received from the COO/ESAC/framework report, and address concerns
- **Elicit questions** that must be answered in order to have a regional discussion on advancing equity later this year and next year
- **Cultivate champions** who will actively support the equity strategy and action plan

Here is what we heard:

| Audiences | Equity long term strategies | Action items |
|-----------------------------|--|--|
| Elected officials and staff | <ul style="list-style-type: none"> • Serve as a regional convener on affordable housing polices and share best practices with local cities and counties • Convene conversations around the proposal of asset tax • Convene conversations on incentivizing fee structures (e.g. flexible SDC changes based on size of house) | <ul style="list-style-type: none"> • Implement innovative and culturally appropriate engagement with underserved communities and share best practices with local cities and counties • Strengthen education and leadership programs for communities of color to serve on advisory boards • Establish economic development targets • Develop and share best practices of equitable and inclusive policies • Support safe routes to schools • Strengthen decision making processes to increase community involvement • Increase community understanding of Metro’s roles and responsibilities |

| Audiences | Equity long term strategies | Action items |
|-------------------------|--|---|
| Business leaders | <ul style="list-style-type: none"> Regional convener to improve workforce pipeline to cultivate new COBID certified firms | <ul style="list-style-type: none"> Establish fair contracting practices and guidelines for COBID certified firms Implement innovative and culturally appropriate engagement practices to reach minority businesses Provide customized training for COBID certified firms Develop community benefit agreements for new construction projects Change criteria for awarding contracts to ensure small firms have similar opportunities to be awarded contracts (e.g. years of experience) Apply an equity lens to all Metro budget decisions Create appropriate governance structures once strategy is implemented (e.g. oversight committee) Work with youth serving organizations to prepare and develop innovative workforce for 21st century jobs (e.g. STEM) |
| Leaders in philanthropy | <ul style="list-style-type: none"> Align equity policies with philanthropy community funding goals – e.g. equitable and flourishing | <ul style="list-style-type: none"> Share knowledge and best practices about equity Continue to develop and strengthen relationships with other funders in the region |

Discussion groups

The Diversity, Equity and Inclusion program and Communications partnered with MultiCultural Collaborative to help organize, recruit, facilitate, capture and summarize comments at nine discussion groups held in June 2015. More than 130 people participated in the first round of discussions.

Discussion group goal:

- Gauge participants’ priorities and preferences on key Metro programs, policies and initiatives including the equity strategy and action plan
- Help determine the most effective and preferred communications methods
- Help determine the barriers and opportunities to long-term and meaningful engagement with Metro

Here is what we heard:

| Audiences | Equity long term strategies | Action items |
|--|--|--|
| Community leaders from culturally specific groups | <ul style="list-style-type: none"> • Continue to build and strengthen long term partnerships with community based organizations (CBOs) that serve communities of color and youth • Develop innovative and inclusive funding strategies for affordable multi- generational housing (e.g. Bridge Meadows/NAYA) | <ul style="list-style-type: none"> • Diversify Metro staff to reflect changing demographics in the region • Provide opportunities to help increase community understanding of Metro’s role and responsibilities • Host advisory committee meetings (e.g. ESAC) in the community • Provide low to no cost options for recreational activities and use of Metro’s facilities • Transportation planning should consider working families schedule and location of jobs (e.g. getting to jobs during the weekend, after 5 p.m., night or swing shift, jobs located industrial areas). • Provide opportunities for youth from communities of color to intern with Metro |

| Audiences | Equity long term strategies | Action items |
|-----------|--|--|
| Youth | <ul style="list-style-type: none"> • Build and develop long term partnerships with youth leaders • Develop innovative and inclusive funding strategies for affordable and quality queer-friendly housing • Regional convener to address transit affordability and accessibility (e.g. night/weekend schedule) • Ensure transit access connect to Metro parks | <ul style="list-style-type: none"> • Provide paid opportunities for youth to weigh in and share input during the decision making process (e.g. Multnomah Youth Commission) • Provide gender neutral bathrooms at Metro facilities including parks • Ensure clean and safe parks and natural areas (clean restrooms, functioning water fountains, safe playgrounds, lighting) • Ensure transportation connects to livable wage jobs and also is accessible for people who travel with children (i.e. not enough room for strollers) • Ensure cities provide safety lights at transit stops • Provide opportunities for youth to provide input to improve parks (e.g. provide suggestionbox) • Improve approach of informing youth about involvement opportunities (e.g. partner with local schools) • Provide way finding signs at parks for amenities (e.g. locations of bathrooms and water fountains) • Provide low to no cost options to access parks • Ensure park amenity access during winter (e.g. keep bathrooms open all seasonlong) • Create an equity lens around park maintenance prioritization • Provide more opportunities to expose children and youth to parks (e.g. partner with local school districts) • Build and develop a more diverse staff |

| Audiences | Equity long term strategies | Action items |
|-----------------|--|---|
| Native American | <ul style="list-style-type: none"> • Develop innovative and inclusive funding strategies for affordable multi- generational housing for Native American community (e.g. Bridge Meadows/NAYA) • Increase racial representation of Council • Develop innovative approaches to increase professional development opportunities for Native American community • Convener of a regional approach to address transit affordability for elders • Improved transit access to regional parks | <ul style="list-style-type: none"> • Ensure Native American history accurately reflected and showcased at public spaces (e.g. naming of new parks or natural areas that pay respect to the Native American community) • Ensure culturally appropriate community engagement continues (e.g. honoring elders, gifting, providing food) • Ensure better community engagement coordination on projects and programs by cities and counties to limit fatigue in participation by CBOs • Increase the amount of meetings held in the community • Increased cultural activities at the parks • Ensure park entrances are welcoming to all cultures |

| Audiences | Equity long term strategies | Action items |
|------------------------|--|---|
| Asian Pacific Islander | <ul style="list-style-type: none"> • Develop affordable and high quality housing strategies for API community (e.g. rent control, multi-generational) around public transit • Ensure transportation strategies include funds for sidewalks and safe bicycle routes for people of all ages • Convener of a regional approach to address transit affordability (e.g. low- income transit fare or free youth fare) • Consider engaging in Land Banking • Support and promote the reinstitution of inclusionary zoning • Convener of a regional approach to address gentrification and displacement • Increase racial representation of Council • Increase transit access to regional parks • Actively support Vision Zero policies | <ul style="list-style-type: none"> • Provide culturally relevant recreational opportunities at existing parks (e.g. soccer fields and basketball courts) • Ensure better community engagement coordination on projects and programs by cities and counties to limit fatigue in participation by CBOs • Support organizations who develop new leaders and organizers to hold Metro accountable (e.g. OPAL and APANO) • Increase community events at parks • Increase park safety (e.g. address drug and gang activity) • Increase outreach translation • Ensure parks' utilization of indigenous plants • Provide way finding signs at parks for amenities (e.g. locations of bathrooms and water fountains) |

| Audiences | Equity long term strategies | Action items |
|-------------------------|---|--|
| African American | <ul style="list-style-type: none"> • Develop low-income housing strategies to address historical displacement and shortage of affordable housing • Build and strengthen relationships with African American community through partnerships with CBOs • Improve pathways for new COBID certified contractors and workers • Develop affordable housing that is accessible to public transit • Support and promote the reinstatement of inclusionary zoning • Consider engaging in Land Banking • Increase racial representation of Council | <ul style="list-style-type: none"> • Develop diverse African American Advisory oversight committee • Ensure oversight committee members are identified by community and reimbursed for their time • Develop transit-oriented developments that connect African American neighborhoods to opportunities • Continue to involve leaders in public decision-making • Ensure the hiring of youth of color in parks • Assist in the procurement of an African American community/cultural space (e.g. JAMS and Portland Mercado) • Create an Equity Strategy centered on race • Ensure cultural community programming at the parks • Build and develop a more diverse staff and boards • Increase truth telling in order to build trust – Be explicit about broken promises and harms • Removal of Masaai exhibit at the Oregon Zoo |
| Latino | <ul style="list-style-type: none"> • Develop anti-displacement strategies to reduce gentrification • Develop low-income housing strategies to address shortage of affordable housing • Convenor of a regional approach to address transit affordability (e.g. low-income transit fare) • Convenor to address housing discrimination for those without documentation • Increase racial representation of Council | <ul style="list-style-type: none"> • Build and strengthen relationships with Latino community through partnerships with CBO • Translate material about programs and projects into Spanish and ensure bi-lingual staff available to answer questions • Increase racial representation of boards and staff • Improve on educating the public about Metro • Create mentorship opportunities for youth • Increase youth engagement programs to expose youth to nature • Increase the number of meetings held in the community • Provide cultural competency training for Metro staff • Diversify hiring committees |

APPENDIX C: CULTURALLY SPECIFIC COMMUNITY ENGAGEMENT FINDINGS – ROUND 2

The Diversity, Equity and Inclusion program and Communications partnered with MultiCultural Collaborative to help organize, recruit, facilitate, capture and summarize comments at nine discussion groups held in October 2015. More than 100 people participated in the second round of discussions.

Stakeholder conversation goals:

- **Share what we have heard** from the first round of discussions groups held in June 2015 and ask whether community input was correctly captured.
- **Gather additional ideas and recommendations** from the community that may not have been identified during the June discussions.
- **Elicit information** about community priorities regarding the community identified actions and strategies.
- **Cultivate relationships** and understanding about best practices for engaging their communities.

Here is what we heard:

| AUDIENCES | Equity long term strategies | Action items |
|-----------|---|---|
| Youth | <ul style="list-style-type: none"> • Develop quality and low income housing policies to address lack of rental properties (eg rent control) • Utilize TOD to connect underserved communities and neighborhoods to opportunities • Develop anti-displacement strategies to reduce gentrification • Regional convener to advance Black home ownership | <ul style="list-style-type: none"> • Increase Metro focus on the state of homelessness in Portland • Increase inclusion of underserved communities - those best suited to make decisions about their environment and lifestyle - in leadership and decision making • Increase representation of underserved individuals in decision making • Create a SAFE, welcoming and attractive culture for people of color and LGBTQ people by ensuring systems and processes of accountability for racist, sexist, homophobic, transphobic, and xenophobic acts and speech • Change recruitment and hiring and work standards to treat jobs as leadership development opportunities |

| AUDIENCES | Equity long term strategies | Action items |
|-------------------------|---|--|
| | | <ul style="list-style-type: none"> • Include culturally responsive language in job descriptions with a critical race analysis • Build relationships with major youth organizing programs by coming to visit us at our meetings and events • Develop African American Advisory oversight committee of members from diverse backgrounds, identified by the community and reimbursed for their time • Help in the procurement of an African American community/cultural space |
| Native American | <ul style="list-style-type: none"> • Build long-term relationships with the community • Co-create engagement plans that are inclusive and respectful • Develop innovative approaches to increase professional development opportunities for Native American community • Increase racial representation of Council • Convene discussions regarding public safety and law enforcement • Develop anti-displacement strategies to reduce gentrification | <ul style="list-style-type: none"> • Improve transit for Elders • Improve connections between regional parks • Increase the cultural understanding and welcoming at Metro and Metro venues • Connect with the community through inclusive engagement activities • Metro should support and invest in existing leadership development programs • Increase Metro Council participation in community engagement • Create and apply a budget equity lens • Expand indigenous plants in regional parks • Include community history and relationship at regional parks • Create youth advisory positions on boards • Increase Metro staff understanding between equality and equity |
| Asian Pacific Islanders | <ul style="list-style-type: none"> • Develop culturally specific affordable housing options • Increase racial representation of council and Metro leadership • Develop anti-displacement strategies to reduce gentrification | <ul style="list-style-type: none"> • Make data disaggregation part of the equity plan • Articulate and prioritize specific action items for how Metro is holding themselves accountable • Specify Metro’s internal equity goals and objectives • Implement internal cultural inclusion training • Increase the use of community-led assessments |

| AUDIENCES | Equity long term strategies | Action items |
|------------------|---|---|
| | <ul style="list-style-type: none"> • Develop affordable and high quality housing strategies for API community (e.g. rent control, multi-generational) around public transit • Convener of a regional approach to address transit affordability and accessibility (e.g. low-income transit fare or free youth fare) • Be a regional convener to ensure that all agencies are connected around issues of importance (e.g. transportation and housing equity) • Consider engaging in Land Banking • Regional convener of fair and affordable housing guidelines and best practices • Convene multigenerational groups (youth and elders) | <ul style="list-style-type: none"> • Call out affirmative action plans and set target measures for budget • allocation and jobs • Create a formal training program or pipeline of coaching for people of color in lower management level as a bridge to upper management positions. • Increase scholarship and intern opportunities for youth of color • Evaluate outcomes and equity work using qualitative and quantitative measures |
| African American | <ul style="list-style-type: none"> • Develop anti-displacement strategies to reduce gentrification • Utilize TOD to connect underserved communities and neighborhoods to opportunities • Utilize TOD to provide more affordable housing options • Review Metro land/house holdings as part of an affordable housing strategy • Consider engaging in rapid land transfers for communities • Be bold, set a governmental trend and | <ul style="list-style-type: none"> • Conduct race-specific Gentrification Impact Assessments when funding projects in disproportionately African American concentrated areas • Disaggregate African Americans, Black people, from People of Color data to assess our baseline under/service and set targets for an Equity Strategy and Action Plan • Create and apply a budget equity lens • Create marketing materials using strengths-based language and approach to African American culture - “innovation” and resilience framing |

| AUDIENCES | Equity long term strategies | Action items |
|-----------|--|---|
| | <p>standard in equity</p> <ul style="list-style-type: none"> • Be leaders, champions and advocates for equity • Regional convener of fair and affordable housing guidelines and best practices • Increase racial representation of Council • Consider engaging in Land Banking • Invest in a complete community in East County while increasing connectivity to North Portland’s employment opportunity and Black cultural and institutional significance • Support and promote the reinstatement of inclusionary zoning | <p>rather than “low income”</p> <ul style="list-style-type: none"> • Speak clearly to historic accountability • Convene an intersectionally diverse Black Oversight Committee • Community representatives should be Black people who are accountable to the betterment of the community • Form a Rapid Response Initiative to urgently address barriers that African American community members face • Create an explicit strategy about community asset development that helps hold the physical geographic community together • Revisit and strengthen FOTA to reach low-income Black people • Develop apprenticeships and certification programs • Work to simplify the bids to increase COBID certified procurement and contracting, including life experience as a qualification • Invite impacted community members to give testimony at a public hearing to Metro Council, City and the County • Diversity Metro staff to represent regional demographics • Concurrently conduct internal and external equity processes • Create monitoring, evaluation and data metrics • Prioritize Metro senior leadership, Councilor’s, advocates and champions participation in community engagement |
| Latino | <ul style="list-style-type: none"> • Convene around community engagement coordination and culturally specific best practices • Convening housing conversations between developers and community • Increase racial representation of Council • Regional convener of fair and affordable | <ul style="list-style-type: none"> • Increase inclusion of underserved communities - those best suited to make decisions about their environment and lifestyle - in leadership and decision making • Increase involvement of indigenous communities • Increase opportunities for students of color to be more involved in Metro’s work |

| AUDIENCES | Equity long term strategies | Action items |
|----------------------------------|---|---|
| | <p>housing guidelines and best practices</p> <ul style="list-style-type: none"> • Develop affordable and high quality housing strategies | <ul style="list-style-type: none"> • Increase involvement of Latino leaders in decision making processes • Address equity gaps in COBID certified firm language • Provide “subs” with the opportunity to evaluate the “prime” contractors • Create a “prime” report card to see how they are doing when it comes to equity criteria • Increase community involvement related to grants • Increase transparency of allocated grants and contracts at Metro • Develop and implement an equity decision making tool • Share with potential grant applicants information on what successful grantees have done • Increase staff awareness of issues of access and inclusion • Specify Metro’s internal equity goals, objectives and expected outcomes • Increase recreational services in Parks to support youth and gear those services toward cultural communities • Review and improve accountability and evaluation of procurement process, practices, including resource allocations • Continue to improve relationships with communities by going to where they are at |
| <p>Slavic and Russian</p> | <ul style="list-style-type: none"> • Regional convener to advance home ownership for communities of color | <ul style="list-style-type: none"> • Assist in creating church garden for children to learn and play in • Improve on educating the public about Metro • Continue to build strong community relationships by coming out to community activities • Create talking points and popular education curriculum that explains historical discrimination, racism and the role of government in modern inequity and disparity |

| AUDIENCES | Equity long term strategies | Action items |
|-------------------|--|--|
| African Immigrant | <ul style="list-style-type: none"> • Site affordable housing near TODs and frequent TriMet service stops will be ideal since most use public transit for daily travels • Increase connectivity of TOD housing to frequent public transit systems and job sites to preserve employment and reduce layoffs • Develop affordable and high quality housing strategies | <ul style="list-style-type: none"> • Create documents to clarify planning processes • Build awareness and understanding about Metro’s programs and services • Increase outreach translation • Actively engage African youth in educational and training opportunities • Improve on educating the public about Metro • Improve employment opportunities • Increase cross-cultural training opportunities for Metro staff • Use youth internships, summer jobs and employment workshops as steppingstones to potential senior posts, future leadership and management jobs |

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| AUDIENCES | Equity long term strategies | Action items |
|-------------------------------|--|--|
| Transportation experts | <ul style="list-style-type: none"> • Serve as a regional convener on advancing ideas on how to improve access to bus and rail stops, especially to address the issues around the “last mile” • Serve as a regional convener in creating regional partnerships in transportation to increase information sharing and coordination across agencies to better serve communities • Serve as the regional host of aggregated data and information (creating a regional data sharing hub) | <ul style="list-style-type: none"> • Regional flex funds should have stronger equity assessment criteria • Transportation funding should take into account historic investment • Other measurements should be taking into account when assessing grant applications: cost per hour, how many unduplicated rides there are and the number of rides in a given range • Provide demographic and other transportation data to regional partners to assist them in creating more informed decisions |
| Housing experts | <ul style="list-style-type: none"> • Serve as a regional convener on affordable housing polices and share best practices with local cities and counties • Serve as a regional convener on how agencies can overcome hurdles and issues that continue to prevent the development of affordable housing • Increase regional understanding that affordable housing should be located in high “opportunity areas” with access to basic needs such as transit, food, jobs, quality schools, healthcare and parks | <ul style="list-style-type: none"> • Pilot a model impact analysis with attention to race and class • Provide information to local governments disaggregated by race and ethnicity • Develop and implement an equity decision making tool. Assist jurisdictional agencies in creating and implementing an equity decision making tool. • Outreach and educate landlords and realtors regarding equity in affordable housing and rentals |

| AUDIENCES | Equity long term strategies | Action items |
|-----------|--|--------------|
| | <ul style="list-style-type: none"> • Serve as a regional convener on how agencies can consider family size, culturally specific techniques, and transportation options in prioritizing affordable housing assistance • Metro help educate and highlight historic policies and practices that created inequities based on race and ethnicity • Develop anti-displacement strategies to reduce gentrification. Look at East Portland Action Plan's (EPAPs) anti-gentrification plan for sample tools • Serve as a regional convener on how agencies can consider utilizing micro-studios and accessory dwelling units as some ways to fit the need • Support and promote the reinstatement of inclusionary zoning • Encourage an incentive-based mix of nonprofit and for-profit developers. • Serve as a regional convener to explore programs that would encourage shared housing | |

| AUDIENCES | Equity long term strategies | Action items |
|--------------------------|---|---|
| Parks and nature experts | <ul style="list-style-type: none"> • Serve as a regional convener to explore how to create coordinated and stronger relationships with CBO's around the topic of parks and nature • Serve as a regional convener to improve regional coordination of parks efforts • Convene around community engagement coordination and culturally specific best practices | <ul style="list-style-type: none"> • Prioritize partnering with healthcare organizations to increase the opportunities for communities to have healthy experiences • Ensure the diversification of park staff • Train park staff so that they are culturally proficient and trained to work with all communities • Ensure culturally specific content and outreach avenues to increase awareness of parks and park activities • Develop opportunities for artwork creation, presentation and display at parks • Provide access to parks no more than a ½ mile from every resident |

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APPENDIX D: INTERNAL STAKEHOLDER ENGAGEMENT FINDINGS

External Themes & Tactical Ideas - The following are the list of themes that have been consistent over all of the small group discussions with Metro staff. These themes are specific only to those areas that are external (having a community impact) to Metro.

| Consistent Themes – External | Brief Description |
|--|--|
| Invest in strengthening community relationships – | Prioritize resources to build and maintain community relationships and focus on strengthening engagement approaches to increase involvement and partnerships with communities of color. |
| Ensure affordability and accessibility to our parks and venues – | Increase affordability as well as transit, language, cultural and gender accessibility to all Metro parks and venues. |
| Increase community ownership over decision-making – | Adjust practices to increase community involvement in Metro decision-making and increase Metro’s accountability to the community. |
| Work with jurisdictions to provide stronger, more coordinated services – | Convene and continue to provide to jurisdictions to coordinate services and to advance equity throughout the region. |
| Provide more opportunities for increased community use of Metro services – | Expand resources (e.g. financial and recreation) to increase opportunities for communities of color to access and utilize Metro’s services and destination to their full potential. |
| Expand internal internships – | Metro internships provide unique opportunities for employment experience and networking. These internship opportunities should be expanded. Additionally, partnerships with CBOs should be strengthened to improve connection to these opportunities for communities of color. |
| Improve community understanding of Metro’s role and services provided – | Assist communities with understanding the extent of Metro’s responsibilities, services and offered, and destinations managed. |
| Increase accessibility to contracting/ granting/ procurement processes – | Work with communities to simplify contracting, granting, and procurement processes for increased accessibility. |
| Increase community awareness of hiring opportunities – | Strengthen community partnerships and offer outreach services to strengthen community awareness of hiring opportunities. |
| Prioritize increasing opportunities for marginalized communities – | Expand programming and services to support communities who have been historically marginalized. |
| Increase investment in youth – | Metro should focus on advancing career opportunities for youth by expanding its involvement in the classroom, invest in youth leadership programs and expand its internship program. |
| Advance equity in data collection – | Expand data collection methods, placing more importance on qualitative data. |

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| Advance equity in data collection – | Expand data collection methods, placing more importance on qualitative data. Additionally, when available, expand race and ethnicity data collection. |
| Increased support to assist communities of color through the job application process at Metro – | Increase the understanding of the Metro application processes that unintentionally place barriers for marginalized communities to apply for Metro job positions. |
| Create more supportive advisory committee structures to increase community involvement – | <ul style="list-style-type: none"> • Policy to provide compensation, food, and transportation to committee members to break down participation barriers. |

Metro Staff Small Group Discussions – Internal Themes & Tactical Ideas - The following are the list of themes that have been consistent over all of the small group discussions with Metro staff. These themes are specific only to those areas that are internal (culture, process, dynamics, etc.) to Metro.

| Consistent Themes - Internal | Brief Description |
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| Need for equity advocacy tools | Increase the available equity resources, such as trainings and equity decision support tools, to assist staff with applying equity in their work and understand their role in championing equity. |
| Desire for a organizational culture that is fearless when it comes to advancing equity | Innovation and action to advance equity must be a primary value at Metro that is vocalized and demonstrated by leadership. Currently, in many cases, innovation and action to advance equity tends to be met with hesitancy and mild support from management. |
| Skills Training | Diversity trainings have been extremely useful for staff. However, not all staff has been able to access the trainings. Additionally, staff would like to interact more with leadership during these trainings and would welcome more trainings around race and unconscious bias. |

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| Diversification of Metro staff (hiring, recruitment and retention) | Currently, the diversity within Metro’s staff is concentrated in front-line, temporary, seasonal and part-time positions. Diversity is extremely important and Metro should strive to have the most diverse workforce, at all levels, in the Portland metropolitan region by strengthening hiring, retention and retention practices. |
| Creation of a succession plan | Metro staff members feel that upward mobility at Metro is extremely difficult. In order to provide clear ladders of advancement for front-line, temporary, part-time, and seasonal staff, a succession plan must be developed. |
| Amount of process at Metro paralyzes action | Navigating Metro’s processes and systems to enact a new program or project is very time consuming and difficult. Therefore, the thought of navigating Metro’s system prevents staff from developing new innovative ideas and actions to advance equity. |
| Need for mentorship and sponsorship programs | Metro staff members feel that upward mobility at Metro is extremely difficult, especially for staff of color. There is a need for support and guidance to increase the opportunities for professional growth at Metro. |
| Advancing MWESB/CBO contracting and procurement | Increase the availability of trainings for staff to advance social equity contracting practices at Metro. Also, prioritize community partnerships to gain community perspective on how to improve the accessibility of contracting opportunities for MWESB/CBO’s. |
| Improve the effectiveness of internal trainings | The effectiveness of staff trainings have been dependent on the forum and the overall structure of the trainings. Staff recommend assessing the trainings to see which forums and structures have been the most effective and most supportive for staff members to learn. |
| Equality vs. Equity in service provision | When providing public service, Metro must prioritize identifying barriers that prevent communities from accessing the service then work to break down those barriers. |
| Creation of opportunities for safe and honest equity conversations between staff members | There is a lack of opportunities at Metro for staff to have safe and honest discussions with each other around equity. |
| Equity as a guiding value for Metro | Equity should be a guiding organizational value. |
| Equity = good customer service | Venue staff members see equity as good customer service and are continually striving to advance equity. |

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| Lack of resources to advance DEI efforts in HR | HR needs additional personnel resources to advance Metro’s hiring and recruitment efforts. |
| Lacking time resources for staff participation in DEI efforts | Metro staff members lack the time and the resources to participate in internal DEI efforts. |
| Expand and improve internal internships | Internships at Metro are a unique opportunity for communities to gain experience in a variety of fields. Currently, there isn’t an agency-wide approach to internships and therefore internships at Metro are limited and uncoordinated. |
| Importance of qualitative vs. quantitative data | Metro places a great amount of weight on quantitative data and not enough weight on qualitative data. This unequal balance needs to change so that qualitative data holds as much significance as quantitative. |
| Sustain community relationships and improve community trust | Metro must prioritize the creation of new opportunities to continue to build community relationships and trust. Bring the personal back into the work at Metro. |
| Improve communications and transparency between staff at various levels | Many staff members feel that there is a disconnect between them and their higher level managers. There is a general lack of options for communication and relationship building across staff hierarchy . For this reason, there is a general feeling that there is a lack of transparency related to decision-making within some departments. |
| Improve access to benefits for all staff members | Front-line, temporary, part-time, and seasonal staff members have difficulties accessing trainings, educational opportunities and other benefits at Metro. These staff members should be prioritized to ensure that they have the same opportunities as other staff members. |
| Metro Regional Center (MRC) building isolation | The Metro Regional Center (MRC) building is isolated from the other venues and destinations within Metro’s portfolio. This isolation is not just physical. Many feel like the staff at MRC receive priority service support and that internal decisions are made without full input from venues and destination staff. |
| More visible and vocal leadership support | Metro staff desires more visible and vocal leadership when it comes to advancing equity. |
| Values at Metro continue to be head over heart | Metro culture places more importance on data, research and other technical areas than non-technical areas such as community relationships. |

APPENDIX E: ORGANIZATIONAL SELF-ASSESSMENT RELATED TO RACIAL EQUITY
Report Findings

APPENDIX F: TOOLKIT TO CREATING A DEPARTMENT SPECIFIC ACTION PLAN