



Equity Baseline Report

Part 1: A Framework for Regional Equity

January 2015

AUTHORS AND ACKNOWLEDGMENTS

This report is the culmination of a yearlong process initiated by Metro to better define and evaluate “Equity” in our region – one of the six desired outcomes adopted by Metro Council in 2010 (along with Vibrant Communities, Safe & Reliable Transportation, Economic Prosperity, Clean Air & Water, and Leadership on Climate Change). This report was written collaboratively by members of the Metro Equity Baseline Technical Advisory Group (Baseline Workgroup), and Metro staff, with the support of Portland State University’s Institute of Metropolitan Studies. Organizations represented by the Equity Baseline Workgroup include the Urban League of Portland, the Asian Pacific American Network of Oregon (APANO), OPAL Environmental Justice Oregon, the Center for Intercultural Organizing (CIO), the Coalition for a Livable Future (CLF), and Adelante Mujeres.

Members of the Equity Baseline Workgroup are responsible for the iterative process that informs the content of this report. They selected Jared Franz, Policy Director at OPAL Environmental Justice Oregon, to act as lead author. Jared is therefore ultimately responsible for ensuring that the collaborative efforts of the Equity Baseline Workgroup and Metro staff are properly represented in the report.

The Equity Baseline Workgroup wishes to acknowledge the leadership of Metro Council Members and Martha Bennett, Chief Operating Officer of Metro, for prioritizing the development of an effective Equity Strategy to guide regional decision-making. We also wish to acknowledge the leadership of Nuin-Tara Key, former Equity Strategy Program Manager, and Pamela N. Phan, former Equity Program Analyst within the Office of the Chief Operating Officer, for helping to develop and launch this critical work.

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Simple justice requires that public funds, to which all taxpayers of all races contribute, not be spent in any fashion which encourages, entrenches, subsidizes, or results in racial discrimination.

–President John F. Kennedy

The fact that we are here and that I speak these words is an attempt to break the silence and bridge some of those differences between us, for it is not difference which immobilizes us, but silence. And there are so many silences to be broken.

–Audre Lorde,

The Transformation of Silence into Language and Action

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METRO EQUITY STRATEGY EXECUTIVE SUMMARY

The intended audience of this report is the Senior Leadership Team of Metro, the Diversity, Equity, and Inclusion (DEI) Program, the Metro Council, the Equity Strategy Advisory Group, and community members/organizations that will assist Metro in its continuing equity efforts. While other groups and individuals might find the framework described in this report interesting or valuable for their own purposes, the development of this framework report is intended to guide Metro toward a more complete understanding of its roles and responsibilities with respect to regional equity concerns.

This report is the culmination of a yearlong process initiated by Metro to better define and evaluate “Equity” in our region. The equity indicators (or indicator categories), as defined in this report, recognize the interrelated nature of equity. These indicators are intended to provide Metro with a clear and consistent framework for understanding and measuring equity, how it is achieved through the practice of justice, and how it intersects with Metro’s other desired outcomes.

The six community-based organization members, who make up the Equity Baseline Workgroup responsible for the development of this report, recognized that an overly simple survey of the region’s inequities would not serve the intended goals of this baseline project, as such a report would be redundant to the many well-respected analyses on regional inequity that already exist. Moreover, a report that is just another description of the known inequities in our region does not provide specific enough guidance for the development of Metro’s equity strategy. Workgroup members and Metro staff thus ultimately agreed that a meaningful equity baseline must first begin with **the development of a shared understanding of what equity itself is and requires, in addition, to a durable approach to assessing equity that is specific to Metro’s roles and responsibilities in the region. A shared understanding and framework provides necessary focus to subsequent equity efforts and improves the likelihood of successful strategies.**

The equity indicator framework introduced in this report has therefore been developed to drive further community-led inter-departmental discussions related to Metro’s equity effort, both internally in terms of employment and contracting decisions, and externally in terms of the programs and services it provides. This structured audit of Metro’s programs and policies will identify areas where Metro can make an immediate impact on agency and regional inequities, as well as areas where Metro can lead or facilitate longer-term strategies that include, but are not limited to, better data collection and regional coordination. The goals and opportunities identified by this community-led process should help Metro create equity priorities, based on a shared understanding of Metro’s authority and influence over each equity indicator category, and the urgency of community identified needs.

Similarly, Metro should collaborate with community organizations to establish agency-specific performance and accountability measures for each equity indicator. By establishing annual performance and accountability measures, Metro will be able to more effectively assess and communicate how the agency is addressing disparities in our region according to its jurisdictional authority.

Indicators

After considering the need for racial and economic justice in our region, and guided by research on the social determinants of health, the workgroup identified ten areas of primary concern for Metro’s equity efforts. Clear definitions and measurements of disparities in each of these ten areas constitute the ten indicators on which Metro should focus its data collection and equity strategy efforts. In the simplest terms, these ten areas are:

- **Housing Equity:** The lack of affordable, stable, diverse, accessible, and high quality housing options for people of color and people living on low incomes is a root cause of inequity in our region.

- **Transportation Equity:** Transportation, housing, and other policies that increase car-dependency in our region by not providing adequate transportation alternatives promote cycles of poverty, segregation, and displacement.
- **Cultural Equity:** People from culturally marginalized communities need publicly supported institutions, programs, and spaces that allow them to celebrate their experiences, languages, arts, and traditions to strengthen community stability, cohesion, and engagement.
- **Environmental Equity:** Low-income communities and communities of color deserve the same opportunities as other communities to enjoy clean land, air, water, publicly accessible parks, and protected natural areas.
- **Health Equity:** Persistent regional inequities that result from social, economic, and political exclusion, as well as environmental conditions are the primary determinants of disparate health outcomes.
- **Economic Equity:** Persistent forms of employment discrimination, as well as the lack of small business support, fair access to economic capital, local hiring practices, job training programs, living wages, and other barriers to wealth accumulation in marginalized communities entrench regional inequity and reduce economic growth.
- **Food Equity:** The disappearance or lack of access to affordable, nutritious, and culturally appropriate food sources in low-income communities, rural communities, and communities of color reinforce regional health and economic disparities.
- **Education Equity:** Educational attainment is one of the strongest predictors of health outcomes, economic prosperity, and social capital, and persistent barriers to education

faced by people of color and people living on low incomes amplifies regional disparities.

- **Meaningful Engagement:** Marginalized communities need institutions, relationships, and representation that nurture and support the development of their social capital, which allows them to meaningfully influence public policy and priorities.
- **Restorative Justice:** Crime prevention and harm reduction must address community-level outcomes by focusing on short- and long-term problem-solving, restoring and supporting survivors, strengthening normative standards, and effectively rehabilitating and reintegrating offenders to break cycles of poverty and the disenfranchisement of people of color.

Conclusions and Recommendations

The Equity Baseline Workgroup believes that Metro must use a **racial and economic justice-based approach** to equity in order to adequately take into account its social, political, environmental, and economic dimensions. Furthermore, Metro must understand that equity and the agency's other five desired outcomes cannot be segregated from one another or discussed in isolation.

The 10-indicator framework and the racial and economic justice lens that this report introduces are not intended to provide the complete technical analysis that Metro needs to more fully understand its roles and responsibilities for equity in our region. Nor does this report offer substantive policy recommendations that respond to known disparities. Rather, it provides the framework that will guide a structured "equity audit" of Metro, which is the critical next step in Metro's equity strategy development.

The trauma of historical and contemporary abuse, neglect, and exclusion of people of color and others in our region is very real,

and improved community outcomes are ultimately the purpose of Metro's equity work. To succeed, Metro must commit to making internal and institutional changes that reduce these disparities, where Metro has the authority and influence to do so, as quickly as possible.

A Community-led Audit of All 10 Equity Indicators at Metro

This report makes clear that marginalized communities suffer the most from regional inequity because of their cumulative exclusion from social, political, and economic capital. Metro must acknowledge that the disparities outlined in each of the ten indicators in this report greatly influence the health, wealth, and happiness of individuals and communities within our region. In so doing, Metro must also acknowledge the importance of a continued collaboration with community members and organizations that are most impacted by Metro's equity initiatives to assist Metro in its examination of its roles and responsibilities for equity in our region.

The creation and careful definition of the ten equity indicators highlight the complex, integrated, and overlapping policies and practices that disparately impact community members across the region. Each indicator includes a carefully framed definition and a brief introduction of the issue that includes sufficient national and local context to make clear what each indicator is meant to measure.

Additionally, each indicator includes a brief discussion of its impact Metro's five other desired outcomes, and a description of preliminary efforts to better understand Metro's roles and responsibilities.

A structured, community-led audit of Metro's internal and external programs guided by these indicators would identify areas where Metro can make an immediate impact on agency and

regional inequities, as well as establish agency-specific performance and accountability measures for each equity indicator, which will allow Metro to more effectively assess and communicate how the agency is addressing disparities in our region.

Such an audit would assist Metro with identifying opportunities for Metro to lead or facilitate longer-term strategies that include, but are not limited to, better data collection and regional coordination. The goals and opportunities identified by this community-led process should help Metro create equity priorities, based on a shared understanding of Metro's authority and influence and the urgency of community identified needs.

Additional Indicator & Data Recommendations

One of our key findings is that equity-related data in our region are frequently incomplete or nonexistent. Without improved data, Metro will be unable to effectively measure or respond to regional disparities. Thus, Metro should work with local jurisdictions and community organizations to better understand data deficiencies and to collaborate on collecting new data. The need to improve regional data must not be a barrier to developing strategies that address known disparities, but improved data is one of the central roles that Metro can play in our region.

In addition, Metro should continue to invest in vital, local data providers and analyses such as the Regional Equity Atlas, Greater Portland Pulse, *Unsettling Profiles*, and *The State of Black Oregon*. Finally, it should develop a thoughtful strategy for internal data collection and analysis based on this framework report.

FOREWORD

by Pietro Ferrari, Metro Equity Strategy Program Manager

The Equity Baseline Report: A Framework for Regional Equity is an authentic community-led report resulting from a yearlong collaborative effort conducted by six local community based organizations (CBOs). The organizations 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 in our region.

Building an effective Equity Strategy and Action Plan requires a keen understanding of the historical and current community needs that Metro seeks to address. From such a foundation, Metro can better understand current needs, track future trends and assess the impact of public policy.

This effort also requires making an honest assessment of internal 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, 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 and Action Plan.

In 2010, the Metro Council adopted equity as one of the region’s six desired outcomes, and in 2011 initiated the development of an organizing framework to help Metro consistently incorporate equity into policy and decision-making. The Metro Council further requested that Metro staff inventory how Metro incorporates equity considerations into agency activities. This was completed by staff in 2012 in an Equity Inventory Report.

The inventory report revealed a lack of strategic guidance, duplication of efforts and insufficient agency capacity to address equity. This led the Metro Council to authorize staff to create an equity definition and a formal Equity Strategy and Action Plan. Given the scale of effort needed to strategically move Metro’s equity work forward, staff designed a three-phased approach within a work plan containing six programmatic goals. These include:

1. Establish an agency-wide definition of “equity” to have a shared understanding of it.
2. Establish an Equity Framework containing quantitative and qualitative indicators of existing inequities and disparities that exist in the region, and how communities and people in the region experience Metro’s six desired outcomes.
3. Create meaningful engagement and capacity-building opportunities for communities most impacted by disproportionate burdens to partner with Metro in the design of the Equity Strategy and Action Plan.
4. Define Metro’s role and authority in advancing equity across the region’s desired outcomes as well as identify the institutional systems that stand in the way of equitable outcomes throughout the agency.
5. Build institutional capacity inside Metro to understand, adopt and practice equity in its policies, programs and services.
6. Develop and implement a Metro-specific Equity Strategy that is actionable and measurable.

The present study fulfills the second and third goals of the Equity Strategy work plan.

In fall 2013, Metro conducted a competitive Request for Proposals to select the CBOs to work with Metro staff to establish an equity

baseline. Six organizations were selected: Adelante Mujeres, the Asian Pacific American Network of Oregon (APANO), the Center for Intercultural Organizing (CIO), the Coalition for a Livable Future (CLF), OPAL Environmental Justice Oregon, and the Urban League of Portland. Staff and volunteers from these organizations, acting under the guidance of Professor Meg Merrick from the Institute for Portland Metropolitan Studies at Portland State University, dedicated an enormous amount of time and effort to this report.

Their work included:

- inventorying over 400 datasets and potential regional indicators of equity
- reformulating Metro's six desired outcomes into "Equity Plus Five," effectively embedding equity as a centerpiece of all regional desired outcomes
- identifying, classifying and defining 10 indicator categories, each with its own associated data points, and related them to Metro's level of authority and influence.

The 10 equity indicators identified by the participating CBOs in this report are based on several local and national research studies that collectively provide insights to the lived experience of underserved communities and people of color in our region. These include the Coalition for a Livable Future's Equity Atlas 2.0, Greater Portland Pulse, the Coalition of Communities of Color's Unsettling Profiles report, and the Urban League's State of Black Oregon.

The six community based organizations who authored this report will formally submit it to the Equity Strategy Advisory Committee for approval. In turn, the committee will transmit their recommendations to Metro's chief operating officer; Metro's COO will submit recommendations along with the report to the Metro Council. This will begin the next stage of the development of Metro's Equity Strategy and Action Plan.

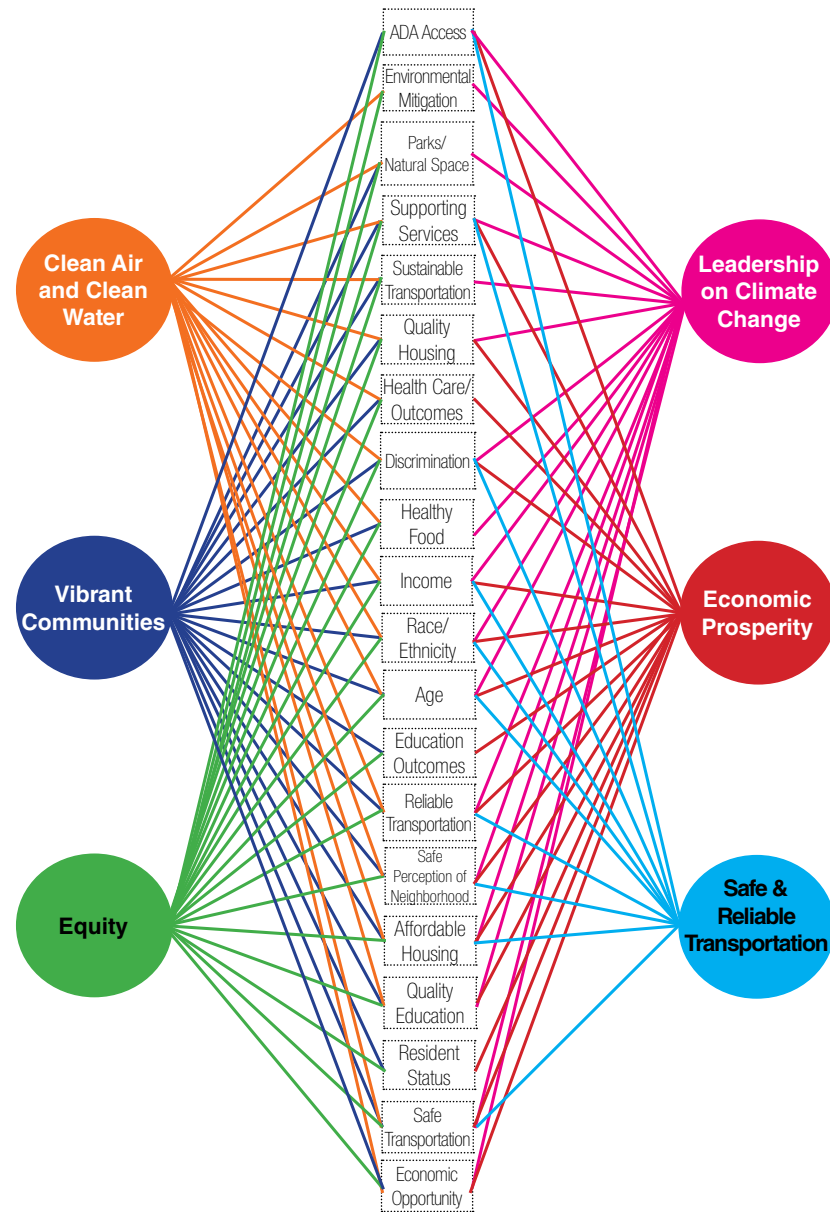
The persistent trends in income and racial inequality in our region are reminders that in spite of our world-renowned reputation for smart growth, sustainability, transportation choices, natural beauty and economic vitality, some people are being left behind – and have been for many years. As the region faces unprecedented demographic growth and transformation, the racial and ethnic groups that have been among the most disadvantaged are now becoming a larger and more visible portion of the population. It is thus in our common interest to work hard to eradicate these inequities and disparities, which transcend city and county boundaries. Ample research throughout the country demonstrates that regions that successfully reduce racial, ethnic and income disparities are socially better integrated and economically more competitive as a whole.

As a regional government, Metro is uniquely positioned to foster resolution of these conditions by increasing opportunities for everyone, particularly historically underserved and marginalized communities, through an agency-wide Equity Strategy and Action Plan. Such a strategy will ensure that current and future regional policies, programs and services incorporate and apply an equity lens more consistently to make this a great place for all.

It is our hope that the contributions of this study are a meaningful step towards that goal.

Pietro Ferrari

SECTION A: WORKGROUP SELECTION AND BASELINE PROCESS



Above: One of the workgroup's early attempts to identify and construct a Metro-specific framework for understanding and measuring equity.

THE EQUITY BASELINE WORKGROUP

The Portland region has a growing national and international reputation as a place where progressive regional governance and land use planning contribute to a high quality of life for residents. Thriving neighborhoods, diverse transportation options, a strong economy, abundant parks, and protected rural areas are among the things that make our region an often celebrated place. Not acknowledged nearly as often, however, are the ways in which many people who call the Portland region home are excluded from some of the benefits of these celebrated investments and policies.

People in our region experience racial and ethnic discrimination, gender discrimination, economic insecurity and segregation, unequal exposure to environmental burdens, and other forms of discrimination that result in disparate opportunities and persistent inequity.

The lived experience of thousands of people bears witness to this reality, and a significant number of research projects have documented these inequalities. Yet the abundance of this information often overwhelms rather than empowers decision-makers to develop effective strategies that address inequity. Uneven standards for collecting or reporting data and the lack of a systematic method for evaluating and prioritizing information are barriers to achieving our region's equity goals.

Given the variances in available regional data, Metro staff chose to rely on community experience to better understand the nature and extent of regional inequality as a first step towards establishing an agency-wide equity strategy. Thus, in late 2013, Metro contracted with six community-based organizations (CBOs) to co-create an Equity Baseline Analysis that includes a list of “equity indicators” – a carefully curated set of data that

would help Metro to better assess, prioritize, and track racial, ethnic, and economic inequality in the communities it serves.

A Metro-specific Assessment of Equity is Necessary

Although there are dozens of valuable local research projects that attempt to describe and quantify our disparate experiences, Metro must consider the many gaps and limitations of available regional data before developing an effective equity strategy. The most comprehensive sources of regional equity data, such as the Greater Portland Pulse and Regional Equity Atlas projects, among others, provide detailed descriptions of demographic conditions throughout the Portland metropolitan area. But even these large research projects must make choices about the types of data they will compile and present, and these choices are rarely informed by the specific policy objectives of Metro. **This means that existing data about regional equity are simultaneously abundant yet incomplete for Metro's purposes.**

To develop an effective equity strategy with meaningful accountability, Metro must first develop a systematic approach to quantifying regional equity concerns over which it has some authority or influence. This systematic approach to measuring equity should help Metro to consistently evaluate existing regional data and reveal areas in which new or improved data is necessary.

Ultimately, this new framework for data evaluation will provide Metro with a baseline measurement of regional inequality from which future progress can be measured and research priorities can be identified. The Equity Baseline Workgroup was thus convened to help Metro with this difficult first step towards an effective equity strategy.

Workgroup Membership

Metro issued a request for qualifications on September 10, 2013, soliciting organizations that serve or represent frequently marginalized communities such as low-income families and communities of color to apply for a grant to work collaboratively with Metro to develop the agency's Equity Baseline. Twenty-five organizations responded by the deadline, and the organizations that submitted the six highest-ranking proposals were invited to contract with Metro.

By design, the workgroup was kept small to promote efficient coordination of the baseline effort, but this limitation on size means that the workgroup is not fully representative of regional diversity. Metro staff, the Equity Strategy Advisory Committee, and workgroup members recognized this concern about the baseline process and have engaged with equity stakeholders and community experts, including members of the Equity Strategy Advisory Committee, to ensure a broad diversity of perspectives on our baseline work.

The six members of the Equity Baseline Workgroup are:

Scotty Ellis is the Equity Program Manager at the Coalition for a Livable Future (CLF). Through his background in community planning and health advocacy, Scotty has developed experience in incorporating health and equity considerations into all levels of policy. Additionally, as the manager of CLF's Regional Equity Atlas, a project that uses maps, research, and story telling to assess regional disparities, Scotty has become a leader in understanding how to transform data into action. Scotty holds Master degrees in Public Health and Urban and Regional Planning from Portland State University as well as an undergraduate degree from the University of San Francisco.

Jared Franz is the Policy Director at OPAL Environmental Justice Oregon and has over sixteen years of education and expe-

rience as a social justice advocate, focused on the intersections between race, income, gender, and geography. Over the last four years, he has supported OPAL's Bus Riders Unite campaign work for transit justice, and has become one of the foremost experts on transportation inequity in the Portland region. Jared is a member of the Oregon State Bar and holds a J.D. with a special certificate in Civil Rights and Environmental Justice from Lewis & Clark Law School, as well as undergraduate degrees in philosophy and anthropology from the University of Utah, and half a dozen years of experience as a community organizer.

Cat Goughnour, consultant for the Urban League of Portland, is a human rights activist and equity advocate with a M.Sc. Sociology: Race, Ethnicity and Post Colonial Studies from the London School of Economics and Political Science, University of London (2009), and a B.A. Liberal Arts: Social and Political Philosophy from Portland State University (2008). Her multi-systemic equity work for Portland's communities focuses on innovating sustainable public health interventions for community cohesion and empowerment. As a certified Multnomah County Community Health Worker, a facilitator with Resolutions NW/Uniting to Understand Racism (2013), a Office of Equity and Human Rights Equity Training and Dialogue Program participant (2012), a Metro consultant, a researcher and a presenter on equity and racial justice, she is deeply committed to helping Oregon's communities understand how issues of diversity, inclusion and equity affect us all, and employs a solution-focused approach to catalyze meaningful social change.

Duncan Hwang is the Director of Development and Communications at the Asian Pacific American Network of Oregon (APANO) and also oversees the organization's community development work in the Jade International District in southeast Portland. After a career in corporate law, he returned to the social justice world and now works to ensure that Oregon's rapidly growing Asian Pacific Islander community's voice is represented in the policy process. He has recently worked on Multnomah

County's Climate Action Plan's equity workgroup and serves on the Portland Development Commission's Neighborhood Economic Development Leadership Group.

Kayse Jama, a founder of the Center for Intercultural Organizing (CIO), was born into a nomad family in Somalia. He left when the civil war erupted, and finally found sanctuary in Portland. From 2005 to 2007, he trained immigrant and refugee community leaders in five western states – Oregon, Washington, Nevada, Utah, and Idaho – under a prestigious New Voices Fellowship at Western States Center. He has been awarded the Skidmore Prize for outstanding young nonprofit professionals (2007), the Oregon Immigrant Achievement Award from Oregon chapter of the American Immigration Lawyers Association (2008), and the 2009 Lowenstein Trust Award, which is presented yearly to “that person who demonstrated the greatest contribution to assisting the poor and underprivileged in Portland.”

Andrew Riley served as Public Policy Director of the Center for Intercultural Organizing from 2010 to 2014, and has continued to represent the organization alongside Kayse Jama on the Equity Baseline Workgroup. Although his research background is in the cultural anthropology of immigrant and refugee adaptation, he has worked at the intersections of social justice activism and public policy for ten years, and his professional focus has been developing inclusive public policy systems which are led by and meet the needs of historically-underrepresented communities. Prior to his work at CIO, Andrew was a quantitative research analyst with Multnomah County's Budget Office, responsible for measuring the strength of county social support programs. He was a co-recipient of the Oregon Public Health Institute's 2013 “Genius Award,” awarded to the Oregon Health Equity Alliance for its successful work to advance health equity legislation in Oregon.

Gerardo Vergara-Monroy is the Equity Baseline Contractor of Adelante Mujeres. Originally from Mexico City, Gerardo holds

a B.A. in Economics from the University of Baja California and a Masters in International Commerce and Finances from the Universitat de Barcelona. Residing in Forest Grove since 1998, he has been involved in the community as a volunteer at the Forest Grove Public Library, as a board member for Adelante Mujeres, and presently a volunteer with Entre Nosotros, a group that brings Spanish programs to the Forest Grove Public Library for the Latino community.

In addition to these community-based members of the workgroup, Metro contracted **Meg Merrick**, PhD., from Portland State University's Institute of Metropolitan Studies to provide technical support for the project. Dr. Merrick is a Research Associate and Assistant Director of Community and Neighborhood Geography, and a widely respected academic expert on demographic data collection and analysis. She is the coordinator of Greater Portland Pulse as well as the Community Geography Project, and a contributor to the Coalition for a Livable Future's Regional Equity Atlas Mapping Tool.

The primary Metro staff supporting the baseline project are: Pietro Ferrari, equity strategy program manager; Juan Carlos Ocaña-Chiu, equity program analyst; Molly Vogt, interim director, Research Center; Karen Scott-Lowthian, interim client services manager, Research Center; Cassie Salinas, Diversity, Equity and Inclusion project manager; Valerie Cuevas, communications administrative coordinator; and Craig Beebe, senior public affairs specialist.

HOW METRO SHOULD THINK ABOUT AND MEASURE EQUITY

Our attempt to construct an equity baseline began in November 2013, with workgroup members surveying nearly 400 available data points that Metro staff culled from reliable national, regional, and local sources. These included data from the US Census Bureau, Greater Portland Pulse and the Regional Equity Atlas projects, and research conducted by the Urban League of Portland and the Coalition for Communities of Color, among other organizations. Initially, the workgroup was asked to sort this nearly overwhelming amount of data into six broad categories based on the six desired outcomes the Metro Council adopted in 2010: Vibrant Communities, Economic Prosperity, Safe and Reliable Transportation, Clean Air and Water, Leadership on Climate Change, and Equity.

Metro's 6 Outcomes



The logic of this approach was that by classifying data into these six outcomes, the workgroup would simultaneously connect the selected data to Metro's roles and responsibilities in the region while identifying data/measurements that describe equity con-

cerns beyond Metro's authority or influence. At the same time, Metro was interested in producing a holistic measurement of regional equity to improve its understanding of inequity even in areas beyond its direct authority and influence. So while Metro's six desired outcomes acted as the original framework for the baseline project, the workgroup was instructed not to limit its consideration of regional equity to the five other desired outcomes.

However, the shortcomings of this approach were soon apparent to both workgroup members and Metro staff. The primary challenge of this approach is that while Metro Council adopted the six desired outcomes in 2010, it has not yet developed adequate definitions of these outcomes. For example, it is difficult to categorize a data point as a relevant measure of "Vibrant Communities" when Metro staff and workgroup members didn't share a common understanding of what a vibrant community is. To select the best data and measurements of Metro's desired outcomes, the workgroup had to more fully define them. Thus the workgroup delayed its continued analysis of available data to better define the various outcomes that Metro was attempting to measure in addition to equity.

Metro's Desired Outcomes

Metro defines Vibrant Communities as the ability of people to "live, work, and play in vibrant communities where their everyday needs are easily accessible." Unfortunately, this circular definition (a vibrant community is a vibrant community) also introduces but fails to clarify phrases such as "everyday needs" and "easily accessible." Thus, the baseline workgroup agreed on the following additions to the definition of Vibrant Communities to guide our efforts:

The neighborhoods and place in which people and families live, work, play, pray, and learn have opportunities and choices of affordable housing, food and open space access, transportation, and culturally specific services necessary to reach their full potential.

In the metropolitan region there is a commitment to reducing the disproportionate disparities that those from communities of color and low-income communities experience, in order to ensure that all people have their basic needs met to attain a high quality of life. Vibrant communities include (but are not limited to) well funded schools, medical, and social services; as well as economic, racial and ethnic diversity.

Metro defines **Economic Prosperity** in a similarly circular manner: “Current and future residents benefit from the region’s sustained economic competitiveness and prosperity.” Thus, the workgroup agreed to add the following to a working definition of Economic Prosperity:

Communities of color experience an unequal share of low-incomes and rates of poverty across the region. To reach an equitable economy, the region recognizes the historic structural and institutional barriers to wealth creation and economic stability for these communities. A focus on raising the median family income proportionate to household size, addressing un/underemployment, and bolstering social supports such as health care can be strategies to stabilize an increasing number of households.

Similarly, the workgroup expanded the definition of **Safe and Reliable Transportation** from “people have safe and reliable transportation choices that enhance their quality of life” to:

A safe, reliable, and equitable transportation system goes where people need it to go (work, play, learn) without a disproportionate cost burden relative to wages. It is a system that provides choices for driving, taking transit, biking, and walking that work in people’s everyday lives, offering efficient and timely connections. It is also a system that is responsive to the needs of all users, including the perspectives of families, professionals, youth, and those with low-incomes or disabilities in decision making about the system.

The workgroup expanded the definition of **Leadership on Climate Change** from “the region is a leader in minimizing contributions to global warming” to:

The region’s approach to climate change should address the tension between the basic needs of residents and the interest in reducing carbon emissions. The region is committed to the support of those communities (low-income, communities of color, transit dependent, etc.) who may be vulnerable to the fluctuations in economic and climate conditions – encouraging resiliency and preparedness as change happens. Regional investment in both active transportation modes and transit should reflect the needs of various users, while also addressing groups which experience the disproportionate negative impacts (both environmental and social) of historic and current investments.

The workgroup expanded the definition of **Clean Air and Water** from “current and future generations enjoy clean air, water, and healthy ecosystems” to:

The region prioritizes ideal health outcomes as a result of improving air and water quality for all residents. The disproportionate burdens that communities of color and low-income communities experience from localized exposure to toxins should be mitigated, or even eliminated whenever possible (e.g. brownfield amelioration, watershed restoration, and strategies to reduce air pollution). The needs of key environmental justice populations are addressed efficiently and with culturally relevant practices.

Finally, the definition of **Equity** itself needed to be expanded. Metro had initially defined equity as simply a situation in which “benefits and burdens of growth and change are distributed equally.” Subsequent to the start our baseline work, however, Metro’s Equity Strategy Advisory Committee approved a much more detailed definition:

Our region is stronger when 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.

Workgroup members respect the effort that went into crafting this aspirational definition of equity, which acknowledges our changing communities and recognizes that inequity is a barrier to achieving our region's potential, which Metro has both the challenge and the opportunity to address. This definition of equity articulates a critical vision. However, the workgroup found this definition insufficient for the very specific purpose of constructing a baseline measurement of regional equity.

Absent from Metro's definition of equity is an explicit acknowledgment that historical context, policies, and investments have contributed to and continue to entrench regional inequities. This omission likely occurred because the Equity Strategy Advisory Committee was tasked with producing a forward-looking definition that acts as a vision statement for a more equitable region. But without reference to historical context and existing disparities this definition does not provide specific enough guidance for Metro in identifying and measuring existing equity concerns. Moreover, Metro's definition of equity does not explicitly acknowledge that particular individuals and communities are disproportionately burdened by regional disparities. While it is true that everyone is likely to benefit from improvements in regional equity, it is not true that everyone is suffering equally from existing disparities. This reality must be acknowledged in order to develop an effective equity baseline and strategy. An explicit focus

on individuals and communities that experience discrimination due to their race, ethnicity, national origin, gender, economic status, or membership in another historically marginalized group, is the only way to ensure that existing disparities are eliminated. Recognizing this, the workgroup supplemented Metro's equity definition with the following paragraph to help focus our efforts:

Economic and social disparities are rooted in historic governance and public decision-making that is both structural and institutional. The region recognizes these historic burdens that communities of color and low-income individuals disproportionately endure, and should prioritize the need to address these burdens in the present, and in the future for sustainable growth. An equitable region also finds these historic communities meaningfully engaged in public decision-making.

Understanding the "Equity+5" Reframing of Outcomes

After arriving at a shared understanding of Metro's six desired outcomes, the second major change in our approach to assessing regional equity came quickly. This is because the so-called six desired outcomes, especially as we had defined them, are not an ideal frame for sorting and prioritizing the hundreds of data points being considered for the equity baseline. In the simplest terms, the workgroup collapsed Metro's six distinct outcomes into a single "Equity+5" outcome.

While Metro is right to name equity as one of its six distinct desired outcomes, 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. This integration of equity into the other Metro outcomes is evident in the definitions that the workgroup created to better guide our efforts, which emerged from the workgroup's intersectional understanding of what equity is and requires.

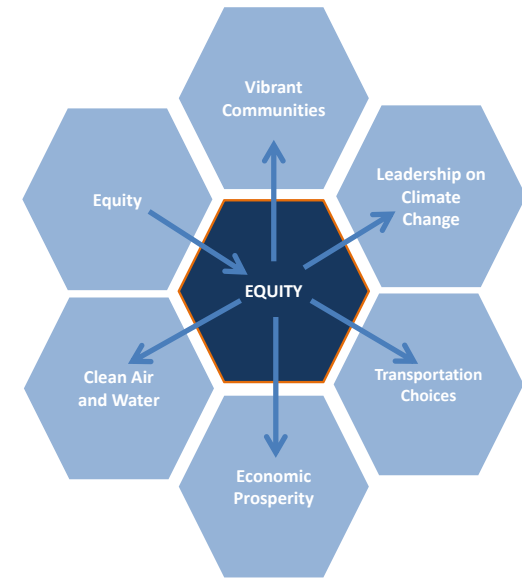
Metro's own efforts to define equity highlight this integrated relationship. In addition to referencing all of the other desired outcomes in the definition of equity adopted by its Equity Strategy Advisory Committee, Metro points out that "institutional and structural inequities lead to disparate outcomes for individuals and communities, even if they are unintended and cannot be linked to an individual's acts or intent. Understanding these distinctions is critical for identifying the parameters of Metro's role as an institution in advancing equity."¹ In other words, equity is the complex product of individual, institutional and structural factors that have to be understood together if equity is to be achieved.

To emphasize this point, Metro offers the example of educational inequity denying individuals the credentials they need to get good jobs, while employment discrimination denies some of these same people the income they need to ensure stable housing, and housing discrimination denies people the ability to access schools that provide a strong education, creating a downward spiral in our communities. To this example, one can add the ways in which transportation inequality denies individuals the ability to access schools, housing, and jobs; or the ways in which environmental inequity impacts public health and property values, and therefore educational success, economic prosperity, vibrant communities, and so on. Countless other examples could be offered to illustrate the ways that the institutional and structural dimensions of equity are intimately linked with Metro's other regional outcomes.

This "Equity+5" reframing of Metro's desired outcomes for the specific purposes of creating an equity baseline thus freed the workgroup to focus exclusively on sharpening Metro's understanding of equity (and ultimately how to measure it), without

¹ See Defining Equity, Metro Equity Strategy Program, September 2013

having to first consider which of the other outcomes might or might not be implicated by selected baseline data. This new and exclusive focus on understanding the complexity and intersectionality of equity then led to the third and final major change in our process: the critical distinction between equity "data" and equity "indicators."



The Concept of an Equity Indicator

The sheer volume of regional data makes it impractical to analyze points of data, in an ad hoc way, to decide if they are appropriate measures of regional equity. Thus, the workgroup developed a new framework for understanding equity based on the recognition that individual points of data are not equivalent to indicators, and indicators are necessary to guide data selection and equity strategy.

While it is possible for an indicator to be a single point of data,² an indicator is most often a collection or composite of related but distinct sets of data that describe a complex phenomenon. For example, data about the frequency of a particular bus is not a complete indicator of access to public transit. A public transit

² For example, the presence of an "indicator species" such as the spotted owl in old-growth forests of the American West is a single data point that acts as an indicator of ecological health.

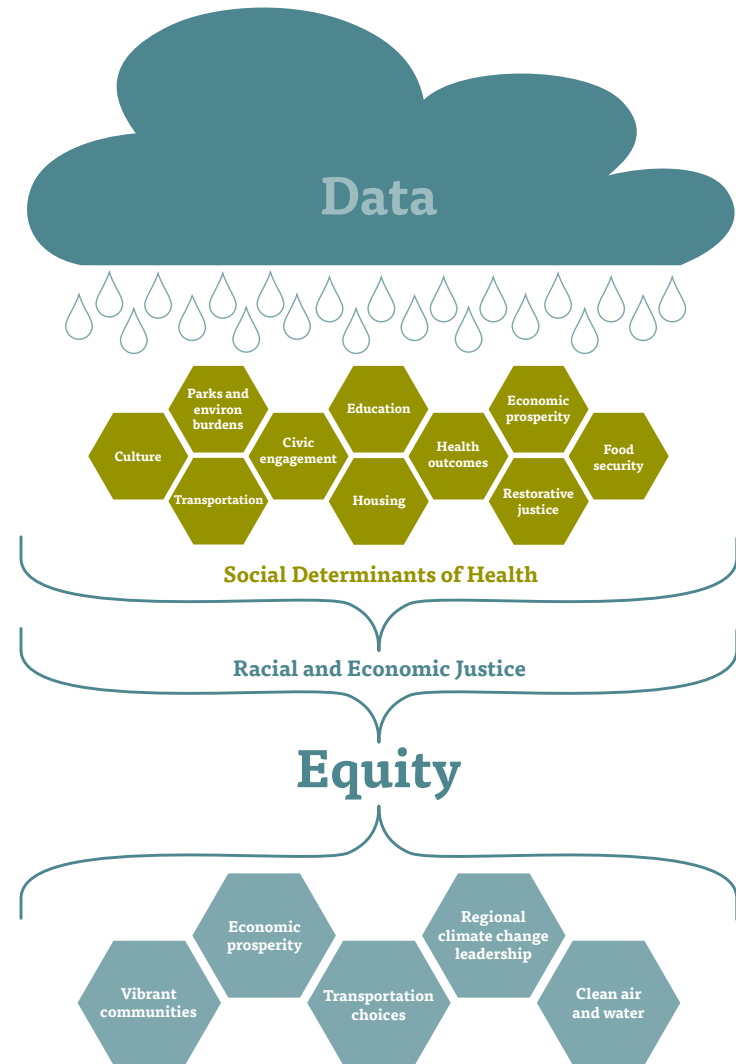
access indicator would also include data about how difficult it is to get to the bus stop, how expensive the fare is, and so on.

Effective indicators should be clearly defined to ensure that the thing being measured is understandable to all people. And while the individual points of data that make up an indicator may change over time as new or better data become available, the indicator itself should remain stable over time to gauge progress towards a desired result.

The equity baseline workgroup initially defined twenty indicators of regional equity informed by research on the social determinants of health. It then narrowed this list to ten using a racial justice and economic justice analysis discussed in a later section of this report.

Once the workgroup defined these indicators, it determined criteria that should be applied when selecting data for each indicator. These criteria encourage Metro to prioritize data that is:

- produced by a trusted source
- available consistently over time to produce a trend
- disaggregated by race, ethnicity, national origin, language, gender, income, age, and disability status to the greatest degree possible
- available region-wide, but able to be disaggregated to local areas for comparisons and mapping
- supportive of collaboration and capacity building with community based organizations
- affordable/feasible to gather



Regional Equity Data Need to be Improved or Reanalyzed

After months of working within this 10-indicator framework and applying the above criteria to evaluate existing data, Metro staff and workgroup members concluded that a significant amount of data need to be improved, updated, or more completely analyzed before the workgroup can produce an adequate measurement of regional equity. As a result, Metro staff have committed to working with group members and other equity stakeholders in an extended process to produce a detailed technical report on Metro's roles, responsibilities, and appropriate measurements for regional equity (*Equity Baseline Report, Part 2: An Audit of Regional Equity*).

This framework report (*Equity Baseline Report, Part 1: A Framework for Regional Equity*) is intended to help guide Metro through that extended technical process by clarifying the methodology that will be used to analyze and present data in the subsequent technical report. The subsequent technical report will formally establish Metro's equity baseline measurements by mapping, evaluating, and analyzing the current state of regional equity using carefully selected data informed by additional engagement with the Equity Strategy Advisory Committee, community experts, Metro staff and others.

Expectations for this Report's Impact on Metro's Equity Strategy

While this framework report does not contain formal equity baseline data and measurements, it describes how the region should think about equity and how measurements of regional equity should be made and maintained.

Metro and its Research Center should adopt the 10-indicator framework for measuring equity, and ensure that indicator categories/descriptions remain relatively stable over time in order to

gauge progress and guide strategy. In a sense, this 10-indicator framework for measuring equity is the most durable outcome of the baseline process.

There is an expectation that the particular data points that constitute each indicator will change over time as new or improved data become available. However, the approach to organizing and evaluating data using well-defined indicators and data criteria should remain consistent.

Workgroup members also expect that Metro to commit to improved data collection over the long term. Metro should collaborate with community partners whenever possible to gather or improve regional data, but it must also accept responsibility for maintaining the data it selects for each equity indicator, as well as encourage new or improved data to be developed.

Finally, workgroup members expect that Metro staff and the Metro Council will meaningfully consider the findings and other recommendations of this baseline report and the subsequent technical analysis when making or implementing policies.



Above. Albina residents picket the Portland Development Commission and the Emanuel Hospital expansion plan in 1973.
Courtesy of the Oregon Historical Society.

HISTORICAL BACKGROUND AND CONTEXT

The Portland region has a long and deeply troubling history of patriarchal white supremacy and racial exclusion. Persistent social and economic disparities in our region are a direct legacy of our history, and Metro must confront this before it can meaningfully define and measure contemporary equity concerns. An exhaustive history of every policy, pattern, and practice of racial discrimination in our region remains outside the scope of this report, and countless other resources already exist that more thoroughly explore this history.³ The reality is, however, that our history and our present are deeply entangled; we cannot begin to eliminate present and future disparities unless we understand the historical and social circumstances in which they are rooted. By understanding where we've come from, Metro will be better equipped to redress historical wrongs in order to meaningfully achieve equity.

Oregon: A White Homeland

For millennia, Native Americans have called our region home. But these thriving and vibrant indigenous communities were violently displaced by increasing white colonial settlement that followed the Lewis & Clark Expedition, the establishment of the Oregon Trail, and the Indian Removal Act in the early nineteenth century. In what would eventually become the Portland metropolitan area, the Multnomah, Clackamas, Chinook, Tualatin, Molalla, and many other indigenous communities lost lives and land to white settlers headed west under the imperialist banner of Manifest Destiny.

Oregon was advertised to the white citizens of an aggressively expanding United States as a place where they could come to escape from the widespread racial tensions in the eastern half of the country. By 1844, the Provisional Government of Oregon passed

³ See especially the Unsettling Profiles series produced by the Coalition of Communities of Color and the academic works of both Dr. Walidah Imarisha and Dr. Karen Gibson.

a law that outlawed slavery, but required all Black people to leave or be subjected to brutal whippings every six months to help ensure that the region remained an exclusively white homeland. In 1848, the Provisional Government passed Oregon's first Black Exclusion Law, making it illegal for any Black or mixed-race person to live in the newly created Oregon Territory.

White settlement accelerated rapidly after Congress passed the Donation Land Claim Act of 1850, guaranteeing free land to white male settlers in the Oregon Territory. This began a nearly four-decade period of continuous war between white settlers and Native Americans. And when Oregon ultimately joined the Union as a "free state" in 1859, it retained the Black Exclusion Law in its constitution, and affirmatively continued to prohibit Black people from moving into the state, owning property, testifying in court against white people, or entering into contracts. Black people who were already in the state were also prohibited from voting.

As early as the 1810s, fur traders brought Native Hawaiians (also referred to, sometimes derogatorily, as Kanakas) to the Northwest, and they too were prohibited from acquiring land, testifying in court against white people or voting in Oregon. In the 1860s, the genocide and forced relocation of indigenous communities by white settlers and federal troops grew worse in the wake of the Indian Appropriations Act and the Homestead Act.

At the same time, gold strikes in the Rogue River Valley and Eastern Oregon began to draw a significant number of Chinese immigrants north from California. Oregon responded to this growth in communities of color by formally banning marriages between a white person and a person one-quarter or more Black, one-quarter or more Chinese or Hawaiian, or one-half Native American. Additionally, Oregon passed laws requiring Black, Chinese, Hawaiian, and mixed-race people to pay an annual tax or be forced to build and maintain the state's roads.

The Fourteenth and Fifteenth Amendments to the United States Constitution, adopted after the Civil War in 1868, eventually preempted the Black exclusion clause in the Oregon Constitution and the ban on Black suffrage. But these amendments were not formally ratified by the state of Oregon until decades later. Indeed, Oregon rescinded its initial ratification of the Fourteenth Amendment in 1868 and did not ratify it again until over a century later in 1973. Multiple efforts to repeal Oregon's own exclusion and suffrage clauses were also defeated by public votes, and they remained in Oregon's constitution until 1926 and 1927 respectively. Segregated education of Black children in Oregon also began shortly after the Civil War, with the establishment of small, Black-only schools in both Salem and Portland in 1867.

In 1882, the United States passed the Chinese Exclusion Act, which prohibited Chinese immigration under penalty of imprisonment and deportation. This further increased white hostility and intimidation of Chinese residents in Oregon, including the notorious Deep Creek Massacre of thirty-four Chinese gold miners in what is now Wallowa County.

Like Black and Native American residents of Oregon, people of Asian and Pacific Island descent, including newer populations of Japanese, Filipino, and South Asian Sikh immigrants, contributed significantly to the state's growing economy but were excluded from the full social and economic benefits of their labor. For the Asian and Pacific Island community, this was particularly true in the construction of the Oregon Pacific & Eastern Railway, and the timber, fisheries, and agriculture industries. The state's population doubled in the decade after the completion of a trans-continental railroad by exploited Chinese labor. The railroad also brought an influx of Black people to Oregon, whose numbers continued to expand rapidly as a result of the "Great Migration" of Blacks fleeing the brutality of lynching and Jim Crow laws in the South.

Unfortunately, Black migrants to Oregon faced many of the same racial hostilities and exclusionary practices that they were at-

tempting to flee in other parts of the country. Most of the stores and hotels in Portland were explicitly reserved for white people only, and the small but growing Black community was intensely concentrated in the area of downtown surrounding Union Station, where many Black residents worked. By 1919, Portland had developed a real estate "Code of Ethics" that prevented Black residents from living anywhere in the city except for small and well defined areas of town beginning with the area around Union Station and what is now the Rose Quarter, then known as Lower Albina. This practice, known as *redlining*, later included later included other racial and ethnic groups.

A chapter of the Ku Klux Klan was established in Oregon in 1921, and Walter Pierce, a known member of the Klan, was elected Governor the following year. The state further restricted the ability of Asian immigrants to lease or own land by passing the Alien Land Law of 1923. And in 1924, the Federal government significantly expanded racist, exclusionary immigration policies to prevent the growth of "undesirable" Asian and Pacific Island communities. These laws were particularly devastating to the growing Chinese and Japanese areas of downtown Portland, and the city quickly gained a reputation as "the most segregated city north of the Mason-Dixon line."

In May of 1942, shortly after the US' entry into World War II, Portland's Japanese American community was forced to abandon all of their personal property except for what they could carry, and live in a poorly constructed camp on land formerly used as a livestock yard in North Portland (now the Portland Expo Center, managed by Metro) before being sent to more remote internment camps in California, Idaho, and Wyoming. In 1942, at the peak of its operation, 3,600 detainees were incarcerated at the Assembly Center. At the of the war, the Oregon House of Representatives explicitly requested that President Roosevelt prevent the return of these Japanese Americans to their homes.

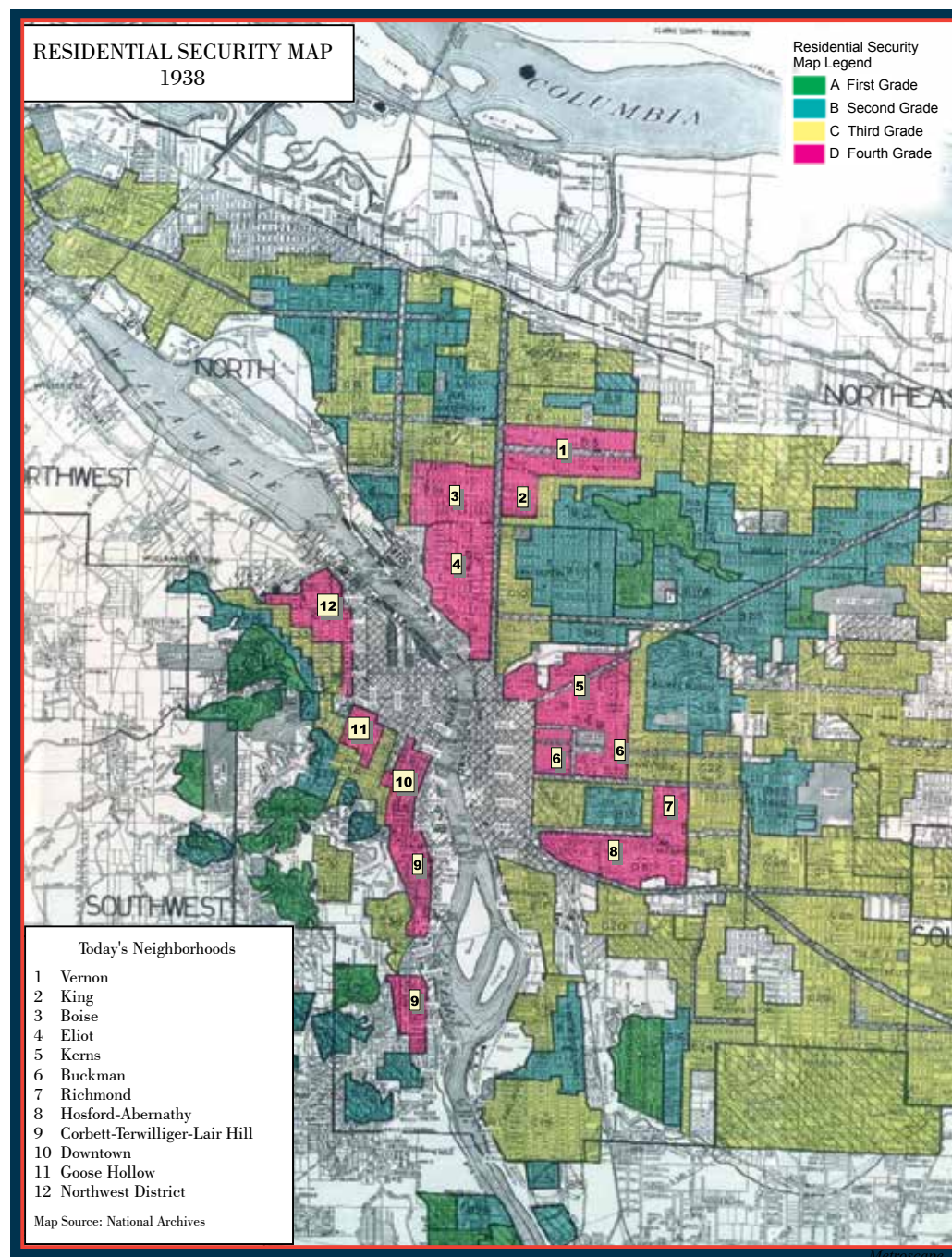
The economic expansion of Oregon's economy, during World War II, significantly increased demand for both industrial and

agricultural labor. To meet the country's growing need for a low-paid labor force, over 15,000 Mexican immigrants, known as *braceros*⁴ came to the state under the Emergency Farm Labor Supply Program, where they faced racial discrimination and hostility from landowners and law enforcement, as well as unsafe housing and work conditions.

The growing need for industrial labor, particularly in the wartime shipbuilding yards of Portland, led to the rapid construction of Vanport on adjacent unincorporated land. Vanport, which became the second largest city in the state, was approximately 40% Black. When a poorly constructed dike on the Columbia River broke in 1948, this once-thriving community was flooded. The city's emergency management was alternately poor and incompetent, with officials declaring that the dikes would hold, and that residents should remain in their homes. The hastily built housing was destroyed, and thousands of people, most of them Black, were left homeless with few options for relocation due to Portland's restrictive racial housing covenants.

Active, governmentally-sanctioned racial discrimination continued in Oregon into the latter half of the 20th century. In 1950, the Federal government terminated the treaties it had signed with Native Americans, refusing to recognize the sovereignty of 109 tribes, 62 of them in Oregon, continuing the long tradition of white disenfranchisement of indigenous peoples. Oregon banned interracial marriage until 1951 and the state didn't pass its first fair housing laws until 1957.

⁴ Spanish: "those who work with their arms"



Above: Portland's 1938 Residential Security Map, sometimes referred to as a "redline" map.

The Persistence and Growth of Regional Inequity since the Creation of Metro

The disparities we face today have their roots in the historical forms of discrimination and oppression in our region. This is especially true as we look at the recent past: many of the planning policies that local jurisdictions like Metro have championed as improving our region's "livability" have also had powerfully negative consequences on already-suffering communities.

Our region has experienced significant population growth in recent decades. In the 1980 Census, the population of the region's three core counties was about one million; by 2010, it had nearly doubled, to 1.85 million. At the same time, the region's population is also more diverse: although Metro-wide numbers are unreliable, in 2013, 75 percent of the City of Portland's population was white, compared to about 85 percent of the city's residents in 1980. Our region's population is expected to continue growing at a rapid pace, with the State of Oregon projecting a combined 2.5 million residents in Clackamas, Washington, and Multnomah counties by 2050.

That explosive growth has led to its own challenges. The redlining, blockbusting, and segregation of the early and mid-20th century have transformed into "urban renewal" and its accompanying gentrification, displacement, and disruption of many communities' social fabrics. This has been especially felt in the Black community. After the 1948 Vanport flood, many of that city's Black residents were displaced into the Albina neighborhood and surrounding areas in North and Northeast Portland, which became the heart of our region's Black community.

Legacies of Redlining: Gentrification, Urban "Renewal," and the Changing Face of Portland

In the 1960s, the City of Portland began looking seriously at ways to bring "urban renewal" programs to inner North and Northeast

Portland. Decried by activists as a program of "Negro Removal," the newly-founded Portland Development Commission's (PDC) plan called for the active displacement of one-third of the city's Black population. Although never fully implemented, the PDC's plan presaged the city's commitment to "develop" North and Northeast Portland regardless of the impact of such development on communities of color.

Taking together, our region's growing population, the rapid pace of residential and commercial development, and local governments' "urban renewal" programs have led to rising rents and fewer housing options, especially for renters. In 2013, Portland's rate of rental vacancies, which indicates how many units are available for prospective renters, was the second-lowest in the country at 3.1 percent. There are more people competing for fewer housing units, which has rapidly inflated rental costs and led to a profound shortage of rental housing which is affordable for low-income tenants.

Those realities have also led to the gentrification of many of our region's neighborhoods, which has had a disproportionate impact on people of color, and the Black community in particular. In 2010, for example, just under 15 percent of North and Northeast Portland's population was Black, compared to over 35 percent in 1990.

Gentrification is not just an issue of migration or displacement: the decentralization of communities of color has a direct impact on the ability of businesses, churches, and social institutions to thrive; communities' internal social safety nets; and access to safe, habitable, and affordable housing, among other impacts.⁵ Gentrification and population growth have also had an impact on our region's suburban areas. Many suburban areas have grown at a similar or even faster rate than Portland, and many

⁵ For more examples, see the CDC's guide to the health effects of gentrification at <http://www.cdc.gov/healthypplaces/healthtopics/gentrification.htm>

are diversifying at faster rates, as well. In Beaverton, for example, the 1990 Census reported that 88 percent of residents were white, compared to just 63 percent in 2013.

A Port of First Call: Recent Immigrant Communities

Our region has been a “port of first call” — that is, a first resettlement location for immigrants, refugees, and asylees since the mid-1970s. Global economic factors, including accords such as the North American Free Trade Agreement, as well as geopolitical realities, such as the fall of the Soviet Union, have driven tens of thousands of first-generation persons and families to our region.

Beginning with Southeast Asian refugee resettlement in the wake of the Vietnam War, the Portland metropolitan area has been home to a significant number of migrant communities. Many of these communities’ experiences are discussed in the context of communities of color. But one population is often overlooked: Slavic/Eastern European communities which settled in our region beginning in the late 1980s and early 1990s.

A 2013 community needs assessment⁶ by the Eastern European Coalition paints a bleak picture of the community’s overall well-being. Community leaders have emphasized two key challenges: access to economic opportunity and prosperity, and access to high-quality public education. Almost one-third of Slavic/Eastern European persons in the region reported that they were unemployed. The data reveal a profound gender disparity, as well: nearly 40 percent of women surveyed reported that they were unemployed. Two-thirds of Slavic/Eastern European families live on incomes below \$40,000 per year. Thirty percent of community members report being dissatisfied with the quality of public education in our region.

⁶ http://eecnorthamerica.org/files/6313/7453/0053/Slavic_needs_Assessment_2013.pdf

The Growth of East Portland and East Multnomah County

Our region’s population and infrastructure have expanded in recent decades. Among the most notable of these areas of growth is the area between East 82nd Avenue in Portland and the western boundary of Gresham. In 1981, the City of Portland began to annex portions of unincorporated Multnomah County in this area. Much of this area still lacks basic infrastructure such as sidewalks, paved roads, parks, and connections to regional sewer and stormwater systems.

After annexation into the city proper, successive community development plans led to the rapid construction of tens of thousands of housing units, often without improvements in existing physical infrastructure. The area, now known as East Portland, was forced to absorb a significant amount of the region’s population growth from the 1990s to the early 2010s.

East Portland has become Oregon’s most diverse community. As the region’s population grows and market pressures drive up rental costs in centrally-located neighborhoods, low-income residents and people of color have increasingly been displaced eastward (see maps in Appendix B). These trends are reflected in the community’s demographics: since annexation. Census data show that East Portland’s white population has decreased compared to communities of color; since 2000, the area’s Latino population has increased by 106 percent, and the Black population by 166 percent.

RACIAL AND ECONOMIC JUSTICE

Metro has a clear need to explicitly focus its equity efforts on communities that have been dispossessed, marginalized, or excluded by our region's history of white male domination, only briefly described in the preceding section of this report. Social and economic capital, and therefore access to opportunity and prosperity, is acquired and passed on over generations, and barriers to intergenerational prosperity – disparities in power and privilege both past and present – cannot be addressed by an approach that ignores this historical reality.

As part of its equity strategy, Metro must develop a robust racial and economic justice lens that can be used to evaluate its policies and practices, both in their development and in their implementation. A local example of this more robust racial and economic justice lens has already been developed by Multnomah County and several other local agencies and organizations. But while that more robust lens is beyond the scope of this report, a basic racial and economic justice lens is necessary for sorting, prioritizing, and identifying gaps in regional data that Metro must use in its baseline assessment of equity.

Prioritizing Historically Marginalized Communities

To measure regional equity concerns, it is critical to first recognize that *equity itself is not an activity or theory of change* for addressing these concerns. Equity is an outcome – a state of being – that can only be achieved through the practice of justice. Conceptions of equity that are not informed by an understanding of justice tend to limit the ideal of equity to the equal distribution of future resources and opportunities, while lacking a clear reference to past and current disparities.

This neutral-past, equal-future frame narrowly focuses on interpersonal forms of discrimination while ignoring or minimizing the institutional and structural forms of oppression that create the profound disparities in our communities. Such an over-simple frame prevents these disparities from being eliminated and

thus prevents equity from ever really being achieved. This incorrect but common understanding of equity – often expressed in language like “everyone should have access to...” or “all people should benefit from...” – obscures the fact that many people (particularly white, middle-class, middle-aged, non-disable, cisgendered men) already benefit significantly from current conditions, while specific groups of people are suffering under those same conditions to no fault of their own. Improving the lives of currently suffering communities must be the priority of decision-makers. When this is done, then the outcome of these targeted interventions are to the benefit of everyone in the region. Significant academic research shows that more equitable societies – i.e., societies that intentionally readdress existing and future disparities – enjoy greater social and economic prosperity to the benefit of all.

Justice is the active and ongoing process by which this more equitable society is achieved. The concept of justice contains within it recognition that a past harm and continuing violation has been committed against a specific individual or community, and this wrong needs to be intentionally remedied. Justice is therefore not an activity concerned with improving the lives and experiences of “everyone.” It is about remedying the disparities and suffering of specific individuals and communities, so that a more equitable society can be achieved. Justice is reparative. It heals our torn social fabric and promotes community cohesion. Common metaphors for equity like “a rising tide raises all boats” overlook the fact that historic and contemporary discrimination has left some “boats” anchored to the bottom or full of holes. A rising tide only sinks these boats faster. Justice is about making sure everyone has the same opportunity to stay afloat when the tide rises.

Indeed, the more intentional that decision-makers are in addressing historic and contemporary inequity through the practice of justice, the closer a region will get to equity; and the closer a region gets to equity, the more likely a region is to prosper economically. Dr. Manuel Pastor, who presented to the Metro

Council and staff in June 2012,⁷ has clearly shown that equity is a driver of economic prosperity. In other words, regions that are closer to achieving equity through the practice of justice are the regions that have witnessed the most economic growth. Dr. Pastor also makes clear that this is not a chicken-or-egg proposition. Prioritizing economic growth rarely leads to equity; indeed, it often increases inequity, which then slows down economic growth. However, prioritizing equity actually encourages and maintains economic growth.

It is also important to note that the practice of justice in pursuit of equity is not simply the correct economic approach to regional growth. It is also the correct legal and moral approach. Landmark civil rights laws, such as the Americans with Disabilities Act and the Civil Rights Act of 1964, require public as well as private entities to affirmatively consider the experiences of historically marginalized populations, and the structural and institutional forms of exclusion these populations face. Civil rights laws prevent and seek to remedy the “unintended” disparate impacts that historical and contemporary policies and practices have on marginalized communities, not just discourage intentionally malicious discriminatory behavior at the interpersonal level. And justice is also at the center of almost all of the world’s moral, ethical, and religious traditions. This truth should be evident without the need to turn this report into a legal or philosophical treatise.

Social Determinants of Health and Indicator Development

While many individuals now insist that their behavior is not intentionally or maliciously discriminatory, this does not undermine the reality of racial, ethnic, gender, and other disparities that are the legacies of prior discrimination and enduring forms of ignorance or neglect. As indicated throughout this report, forms of discrimination operate not only on the interpersonal level, but at the structural and institutional level as well

⁷ Presentation to Metro, June 30, 12: Looking Forward: Linking Prosperity, Inclusion and Sustainability in Metropolitan America.

Discriminatory impacts are often the result of seemingly neutral policies and practices that fail to meaningfully consider the ways different communities will be differently impacted, and the social conditions created by these policies and practices are far more determinative of a person’s opportunities and success than their individual behavior is. In a capitalist culture that fetishizes autonomy and individual responsibility, the well-established primacy and influence of social determinants on an individual’s life are far too often overlooked.

Research into the social determinants of health is perhaps the most robust source of evidence and guidance with respect to this complex phenomenon. A focus on individual behavior has long been shown to be an insufficient approach to understanding and improving physical and mental health. Like other forms of inequity, social, political and economic factors are major contributors to health inequity. This is clear in the UN World Health Organization’s definition of Public Health as “the science and art of preventing disease, prolonging life and promoting health through the organized efforts and informed choices of society, organizations, public and private, communities and individuals.” This focus on social and institutional efforts, as opposed to merely individual efforts, is critical to achieving health, which is further defined as “a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.”

Public health research finds that poverty, deprivation, and isolation create a traumatic response in individuals. The body and mind register this trauma as toxic stress and express a physiological pain response to “environmental” stressors, increasing the body’s burden and causing ill health, limiting productivity and human thriving. These socially constructed conditions are artificial, and are therefore amenable to change. But first they must be properly recognized.

The World Health Organization emphasizes that the condition in which people are born, grow, live, work, and age, and the systems

in place to deal with illness, are the key factors. And these factors are shaped by the distribution of money, power, and resources, at global, national, and local levels. Key themes that emerge for Public Health research include, but are not limited to, the central importance of early childhood development and environment, access to safe and habitable housing, access to healthy and nutritious food, income level and employment conditions, and forms of social exclusion/discrimination such as racism, sexism, and ableism. Ultimately, the intersectional effects of these different social determinants on a person's life are profound.

A common example of this profound impact is that public health research shows that a person's ZIP code at birth has a greater impact than their genetic code on their health status as an adult. Location is so strongly correlated with quality housing, good nutrition (or lack thereof), educational access, economic stability and so on that it is considered determinative of health. And indeed, the CDC has recently highlighted that one of gentrification's least-publicized and most pernicious effects is the harm it does to an individual's health because of the way it discourages or destroys the accumulation social, political, and economic resources, and ability to effectively mobilize resources, among displaced people and communities.

Finally, research on the social determinants of health also point to a critical need to develop methodologies and tools for measurement of these social, political, and economic conditions so that disparities can be better addressed. A Metro-specific tool for better defining and measuring these social conditions is the purpose of this report.

Racial and Economic Justice Communities

Once the need to prioritize historically marginalized communities in data collection and policy development is properly understood, the question remains as to which communities Metro should specifically prioritize. The answer has already been sug-

gested throughout this report. While the following list is not exhaustive of the various communities that have suffered, and continue to suffer from historic and contemporary discrimination that have limited their social, political and economic power, the seven most important communities for Metro to focus its equity efforts on are:⁸

Race

Race is a classification of people based on skin color, which developed initially from white supremacist notions of biological difference. Although race is now understood to be socially constructed rather than a biologically meaningful distinction, it is a powerful and enduring way of defining difference between people.

Metro uses commonly accepted definitions of racial categories that this report does not attempt to modify. However, it is critical to note that racial categories are often over-broad and obscure significant differences between members of the same racial classification. For example, the racial classification of "Asian/Pacific Islander" is deeply problematic in that it includes an enormous diversity of peoples, communities, and cultures that make up nearly two thirds of the world's population. When disaggregated by different ethnic or national origin communities, the conflation of all Asian and Pacific Islander communities into a single race exposes the arbitrary nature of racial classifications. This same problem exists in all racial classifications.

For a robust and impactful equity strategy, Metro must still collect and analyze racial data. Significant research shows that race remains a primary predictor and determinant of health, wealth, and other outcomes. The problematic nature of these categories should always be noted, and when possible further disaggregated by ethnic, national origin, and other self-identification.

⁸ This list of communities of greatest concern to Metro is not intended to minimize or suggest that those who suffer from other forms of oppression are not equally worthy of consideration.

Ethnicity/Language

Ethnicity is a characteristic of human groups that have certain key features in common such as a shared history, memory, tradition, language, religion, geography, or other sense of shared origin. It is distinct from race, in that ethnicity is internally defined and understood. While race is ascribed to groups by a dominant group, ethnicity is self-ascribed by a group. Of particular importance to Metro's equity efforts is the difficulty in collecting ethnic data beyond those who identify as Hispanic/Latino. Our region has a growing Slavic/Eastern European population which experiences significant disparities in social, political, and economic resources,⁹ and Metro must develop a way to continue to track these disparities as data collection in this area grows increasingly limited.

National Origin

Nationality is distinct from race and ethnicity in that it is based on a shared sense of identity or belonging to a specific geographic, state, or region. National identity often includes multiple races and ethnicities/languages, and data collection in this area faces many of the same challenges as data on ethnicity. Metro must develop a strategy for improving data collection in this area.

Income

Individuals who live on low-income experience trauma and disparate health outcomes as a result of poverty and are often discriminated against in housing, education, employment and other opportunities. Metro currently defines a "low-income" household as those making 185% of less of the Federal Poverty Level relative to household size. However, the use of the Federal Poverty Level as a measure of sufficient local income is a well-known and deeply problematic approach. This issue and some suggested solutions are discussed later in this report.

⁹ See e.g., the *Unsettling Profiles* report on this population in Multnomah County

Gender

The unequal allocation of resources is impacted by the social construction of gender. Patriarchy – the primacy of male perspective, needs, and experiences – marginalizes all people who do not identify as male. In addition to the social, political, and economic impact of gender discrimination, gender is an often-overlooked dimension for data collection and social research. Metro must ensure that all the data it collects includes data on gender, including data on people who are transgendered or do not otherwise conform to the male-female gender binary.

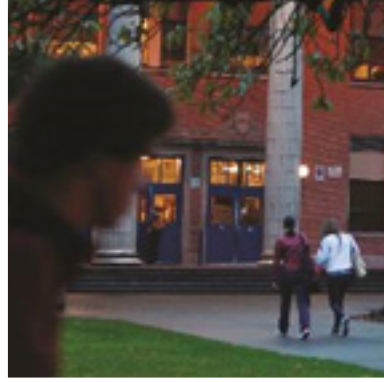
Disability

Disability occurs when physical or social barriers impede the ability of a person to control their level of inclusion in society. The American's with Disabilities Act and subsequent legislation has reduced some of the physical exclusion of certain people from the built environment, but significant barriers persist for people with both apparent and non-apparent physical and mental disabilities. Data collection and analysis of non-physical disabilities is particularly inadequate, and it should be recognized that most laws and approaches to disability focus on ensuring physically accessible facilities in the built environment, not on the provision of services to people with disabilities or sufficient accommodation of non-physical disabilities.

Age

Young people and older adults are often excluded from meaningful and productive participation in civic and economic life. Data collection must always include age, and analysis must always be multi-generational so that disparities can be identified and remedied.

SECTION C: EQUITY INDICATORS



BRIEF OVERVIEW OF 10 EQUITY INDICATORS

After considering the need for racial and economic justice in our region, and guided by research on the social determinants of health, the workgroup identified ten areas of primary concern for Metro's equity efforts. Clear definitions and measurements of disparities in each of these ten areas constitute the ten indicators on which Metro should focus its data collection and equity strategy efforts. In the simplest terms, these ten areas are:

- Housing Equity
- Transportation Equity
- Cultural Equity
- Environmental Equity
- Health Equity
- Economic Equity
- Food Equity
- Education Equity
- Meaningful Civic Engagement
- Restorative Justice

What follows is a brief discussion of each of these ten areas. All of these indicators cover complex and nuanced issues that cannot be fully measured or assessed within Metro's agency-wide equity baseline framework. The workgroup, with the help of Metro's Equity Strategy Advisory Committee and other community experts, has made an attempt to identify and prioritize measurements that it considers the most critical in each area, and these measurements will be more robustly defined in the subsequent baseline report.

The workgroup recognizes that these decisions about indicators and constituent data have an impact on Metro's evolving equity strategy. By selecting what is most important to measure in the region, the equity baseline also creates a measurement that Metro can be held accountable to, and therefore significantly influences the focus (even if not the specific content) of Metro's evolving equity strategy. In the sense that the workgroup has selected "what matters most" for Metro's role in achieving regional equity, indicator decisions are political decisions. But there is no avoiding this if Metro's equity indicator project is going to achieve its ambitions of a more equitable region.

It is important to note that the ten equity indicators and suggested constituent data in this baseline report are not intended to be exhaustive measurements. They are intended to be measurements of only the most prominent issues of concern in each of these ten areas that are also impacted in direct or indirect ways by Metro's roles and responsibilities in the region.



Photo credit: Courtesy of Creative Commons

Definition: *The lack of affordable, stable, diverse, accessible, and high quality housing options for people of color and people living on low incomes is a root cause of inequity in our region.*

Decision makers should prioritize *mixed-income and mixed-use communities that allow people to live near where they learn, work, play, and pray, without the threat of displacement caused by new development, and well served by lowest-cost transportation options such as public transit, walking, and biking.*

HOUSING EQUITY: AFFORDABLE, STABLE, AND HIGH QUALITY HOUSING CHOICES

The housing conditions under which a person is born and raised are among the strongest social determinants of health, wealth, and future achievement. Despite the fact that adequate housing is a human need essential to basic survival and social mobility, many decision makers do not recognize it as a fundamental right that is guaranteed to all people. Partially as a result, the cost of securing adequate housing is the single largest economic burden that most people will face throughout their lifetime.

The impact of this direct economic burden is further amplified by the intimate relationship between housing and a person's ability to access quality education, health care, jobs, and transportation. Home ownership remains one of the most important sources of wealth in our country, and creates the kind of durable wealth that is often key to escaping intergenerational cycles of poverty.

Yet people of color are disproportionately renters, in part because they disproportionately face barriers to home ownership such as high-interest loans or outright denial of their mortgage application. And current research on gentrification highlights the ways in which the displacement of existing low or moderate income renters negatively impacts their physical and mental health, as well as their ability to cultivate social and economic networks that provide both support and opportunity. Because one's housing situation is among the strongest predictors of a person's health and future achievement, housing should be considered one of the most fundamental indicators of regional equity.

Housing must be affordable to people living on limited income, and stable in the sense that new development does not cause residents to be displaced by rising rents or home prices. Housing options must also be diverse and accessible to ensure that families of all sizes and people with disabilities are not significantly limited in their choices. Housing should also be free of structural defects and environmental hazards such as mold and lead.

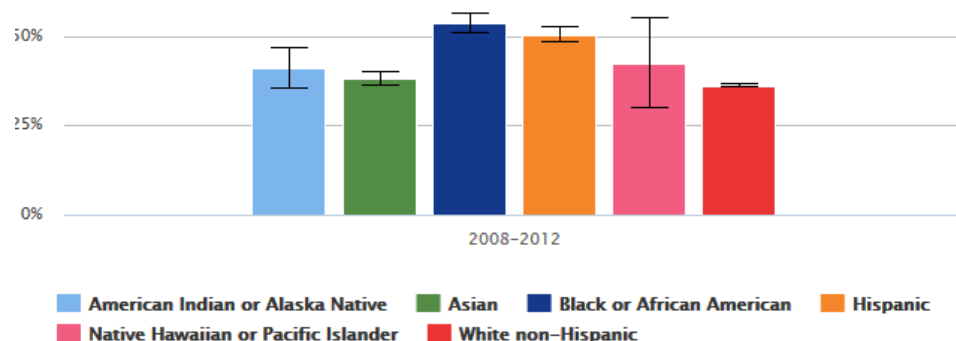
Our region is suffering from an affordable housing crisis. As housing in or near the urban core becomes increasingly expensive as a result of housing, transportation, and land use decisions, many people living on low incomes are forced to relocate to more suburban areas further from education and job opportunities, public transportation, healthy food options, and public gathering spaces. This means that displaced people not only incur the significant costs of relocation, but also face increases in other household expenses, leaving them financially worse off than they were before being forced out of their old neighborhood. This is particularly true of the Black community of inner North and Northeast Portland (discussed in the History and Context section of the report), once the home to the majority of all Black people in the entire state of Oregon.

The displacement of these communities creates new economic pressures on already disproportionately low-income people and destroys interpersonal networks that are essential for accessing opportunity. This frustrates the gains that these communities have fought for and achieved despite centuries of policies and practices designed to marginalize and oppress them. Indeed, because households of color in our region disproportionately live on lower incomes, and therefore already spend a higher percentage of their income on housing, our region's housing crisis simultaneously displaces existing communities while further entrenching racial and ethnic disparities.

Housing Equity and Metro's Desired Outcomes

Housing equity also impacts all five of Metro's other desired outcomes. Ensuring mixed-income and ethnically diverse communities is an essential part of achieving **Vibrant Communities** across our region by avoiding concentrated pockets of poverty or deprivation from limiting the potential of our residents.

Percentage of Households Spending 30% or More of their Income on Housing, by Race (alone) and Hispanic Origin, Portland MSA



Source: Greater Portland Pulse (ACS 2008-2012 five-year estimates)

Moreover, housing and transportation decisions are symbiotically linked, and it is not possible for Metro to achieving the desired outcome of **Safe and Reliable Transportation** without simultaneously considering the distribution of housing choices in our region. **Economic Prosperity** is implicated by housing options as well because of the ways in which housing determines access to quality education and employment. **Clean Air and Water** are denied to people whose housing choices are limited to areas near major roadways, industry and other sources of pollution.

And finally, **Leadership on Climate Change** requires a region in which housing options and controls allow people to live near the places they must go, and therefore reduce the environmental impacts of transportation and other land use decisions.

Metro Authority and Influence over Housing

Metro's urban growth management decisions have wide-reaching impacts on our region's housing market. While the creation of an urban growth boundary in our region has prevented some of the worst aspects of sprawl that characterize housing challenges in other parts of the nation, this artificial constraint on housing development, in concert with Oregon's ban on affordable housing tools such as mandatory inclusionary zoning and rent control, intensifies economic segregation within the growth boundary.

With the help of its Research Center, Metro creates a report on the location of publicly subsidized, affordable housing units in our region and has some authority over rental housing units constructed as part of Transit-Oriented Development (TOD) projects. Metro is also responsible for 42 houses located on property that Metro acquired after these homes were constructed; however, these are mostly located outside the urban growth boundary. It also has more indirect influence over housing issues by hosting the Home and Garden Show and other housing related conventions at the Expo Center and Oregon Convention Center.



Photo credit: Metro

Definition: *Transportation, housing, and other policies that increase car-dependency in our region by not providing adequate transportation alternatives promote cycles of poverty, segregation, and displacement.*

Decision makers should *prioritize lowest-cost transportation options such as public transit, walking, and biking that safely and effectively connect people to jobs, housing, places of worship and education, services and social activities.*

TRANSPORTATION EQUITY: ACCESSIBLE, AFFORDABLE, EFFECTIVE, AND SAFE TRANSPORTATION CHOICES

Transportation and the struggle for equity in the United States share a long and intimate history. In *Plessy v. Ferguson* (1897), the Supreme Court upheld segregation on trains in post-Civil War Louisiana, establishing the “separate but equal” precedent that shaped American law for more than half a century. From Rosa Parks and the Montgomery Bus Boycott in the 1950s to the Freedom Riders in the 1960s, mobility and transportation were at the center of the American Civil Rights Movement, and remain so today.

Transportation equity requires the fair distribution of transportation benefits and burdens, and rejects the disproportionate investment in infrastructure that promotes dependency on private automobiles. In addition to the environmental and livability benefits of public transit and active transportation like walking and biking, transportation equity recognizes that mobility is also an important civil and human right, because of racial and economic disparities in access to private vehicles and the relative cost burdens of vehicle ownership.

In Portland, like other metropolitan areas around the country, people of color are more likely than non-Hispanic whites to lack access to a car and are thus disproportionately impacted by transportation decisions that privilege private automobile use. People of color are also more likely to depend on buses as opposed to rail transit, and are more likely to use transit to make short trips and/or transfer more to get to their destination. Women and people with limited incomes or mobility, including many youth, seniors and people with disabilities, similarly rely disproportionately on transit.

In part, this dependence on buses by marginalized communities is due to regional housing policy that has not supported the stability of residents along newly constructed high capacity transit lines. Increased property values and rents along these lines

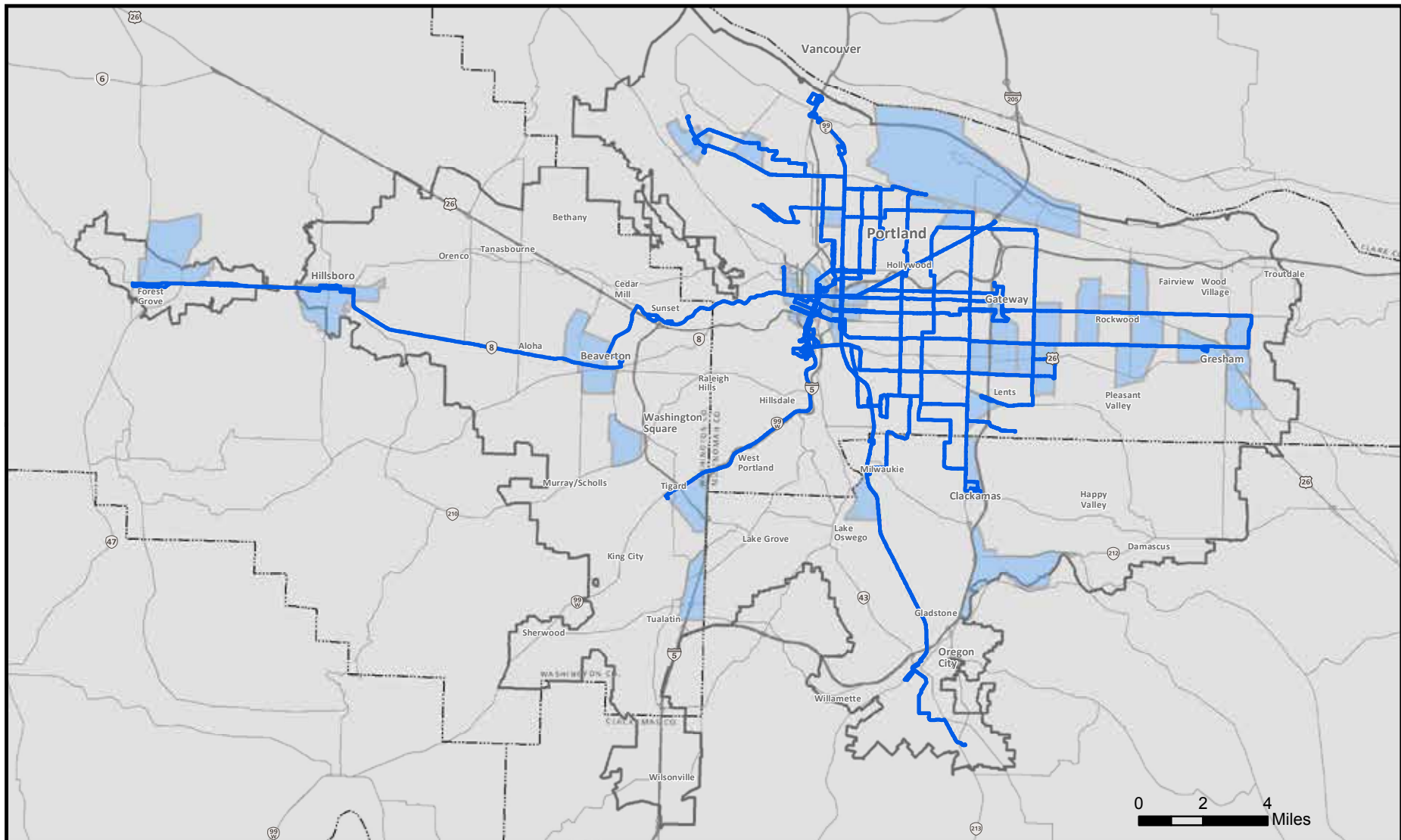
have denied many people of color and people living on limited incomes the full benefit of our region’s multi-billion dollar investment in light rail. Indeed, the strain on local budgets caused by local matching fund requirements for these otherwise federally funded capital projects have worsened mobility for many communities, because it significantly contributes to inflexibility in times of economic downturn or other unexpected shortfall, resulting in bus service cuts, fare increases, and inadequate funding for pedestrian and bike infrastructure.

Transit mode share in our region has been flat for over a decade as a result of these bus service cuts and fare increases, and sparse off-peak transit service remains a particularly significant barrier to alternative transportation use, especially during evenings and weekends.

Transportation Equity and Metro’s Desired Outcomes

Transportation equity has perhaps the clearest intersections with Metro’s other five desired outcomes. Almost any meaningful conception of **Vibrant Communities** includes sufficient pedestrian, bicycle, and transit infrastructure that allows people to access places and services in their neighborhood and beyond.

Likewise, transportation equity is an inherent part of Metro’s desire for **Safe and Reliable Transportation**. **Economic Prosperity** can only be achieved if access to education, jobs, and other opportunities are available to those who cannot afford or operate a car, and alternatives to car use promote **Clean Air and Water** as well as **Leadership on Climate Change**.






Transit Lines with Off-Peak Frequent Service*; Below Regional Median Income Tracts




*Off-Peak Frequent Service: Minimum of 20-minute headways during the time periods of 9 am - 3 pm and 6 pm - 10 pm.

Intermediate Source: Equity Atlas

Primary Source: 2010 Census; TriMet GTFS

Date: Equity Atlas: 2012; TriMet: 2014

-  Transit Lines with Frequent Off-Peak Service
-  Census Tracts with Median Income below 200% Poverty Level (\$39,580)
-  2010 Census tracts

-  Urban growth boundary
-  County boundary
-  Major road

Note: The map, at left, displays TriMet’s transit lines with “off-peak,” frequent service in relationship to below median income Census tracts.

While the map allows us to see that there are several lower income tracts (especially in the south and southwest portions of our region) where there is no off-peak, frequent service available, other aspects of the map may over-represent access to this important service.

First of all, this type of analysis doesn’t take into account the actual proximity of the people who live in these tracts to the transit lines. We cannot see walking distances via street networks (we know, for example, that street connectivity is poor in some of the outlying areas). We also do not know what the actual pedestrian experience is. For example, are there sidewalks and safe places for transit riders to wait.

Secondly, we do not know which portions of the bus lines depicted here actually have off-peak, frequent service. This is because TriMet reports this type of service by line and not geography.

Metro Authority and Influence Over Transportation

Transportation planning is one of Metro’s core functions. The agency has significant authority and influence over transportation decisions in our region. Metro awarded nearly \$70 million for transportation projects in its 2013-14 fiscal year, but awarded only five percent of those funds to Minority, Women, and Emerging Small Businesses. Although it has the statutory authority to operate public transportation in our region, Metro has so far elected to not exercise that authority and TriMet remains an independent state agency providing services that Metro and other local jurisdictions are instrumental in planning and supporting. Metro has maximum authority over the planning of high capacity transit, but in practice does this planning in partnership with TriMet. Metro also makes recommendations about our region’s sidewalk and bike networks, curbcuts, and regional multimodal trails, but must work with local jurisdictions to prioritize these projects. Metro conducts transportation travel studies, and safety studies that monitor crashes on roadways.

Additionally, Metro departments such as the Expo Center, the Oregon Convention Center, the Oregon Zoo and others partner with TriMet to promote transit use by providing discounted transit fares to event attendees. Metro also convenes and sponsors regional bike and pedestrian events in collaboration with community partners such as the Sunday Parkways program.



Photo credit: APANO

Definition: *People from culturally marginalized communities need publicly supported institutions, programs, and spaces that allow them to celebrate their experiences, languages, arts, and traditions to strengthen community stability, cohesion, and engagement.*

Decision makers should *engage with, provide resources to, and otherwise support these communities in preserving, providing, and reclaiming cultural opportunities that allow both new and historic cultural communities in our region to grow and thrive.*

CULTURAL EQUITY: DIVERSE CULTURAL INSTITUTIONS & PROGRAMS

Each individual views his or her everyday experiences through unique cultural lenses and culturally specific perspectives and priorities. Support for cultural institutions and programs, including language support, provides opportunities for individuals to engage in civic life and establish strong connections that help them to thrive. Moreover, such support for cultural opportunities break down societal segregation and cultural isolation by allowing and encouraging individuals to become more engaged and to share in the diverse cultural heritages that make our region great.

Cultural institutions and programs include, but are not limited to, formal and informal spaces appropriate for culturally specific recreation, food, civic engagement, religion, music, and art.

To properly evaluate the state of cultural equity in our region, measures should consider the presence of various cultural groups, the participation of these cultural groups in public life, and the preservation of cultural heritage and diversity. Identifying deficiencies in specific cultural opportunities is important in recognizing the focus of future cultural investments. Nevertheless, future investments should not overshadow the need to preserve existing cultural resources.

Additionally, organizations and agencies should evaluate the participation levels of their civic engagement, recreation, and other efforts and make them more culturally appropriate for marginalized communities. For example, culturally appropriate engagement should include language support, childcare, and opportunities for meaningful engagement that are offered at times and locations that will encourage participation from historically marginalized communities. Efforts to promote the arts and recreation in culturally appropriate ways should include similar considerations.

Unfortunately, there is a serious deficiency of existing data with respect to cultural equity in our region. Data about the availability of culturally specific foods illustrates this challenge. It is well-documented that the availability of culturally specific foods and vegetables leads to a healthy food environment by supporting nutritious food choices that are in line with community food preparation and dietary knowledge as well as cultural beliefs.

However, current data only allow us to examine the existence of full-service grocery stores, farmers markets, and produce stands as seen in the image below. These data may be sufficient for identifying areas that may be considered food deserts (areas lacking affordable or good-quality fresh food). Yet it is not sufficient to determine whether an area may be experiencing a “food mirage” (an area with good-quality food options that may not be culturally appropriate or desirable to local residents). Therefore, in order to adequately understand the state of cultural equity in our region, there must be an investment in new data related to this indicator.

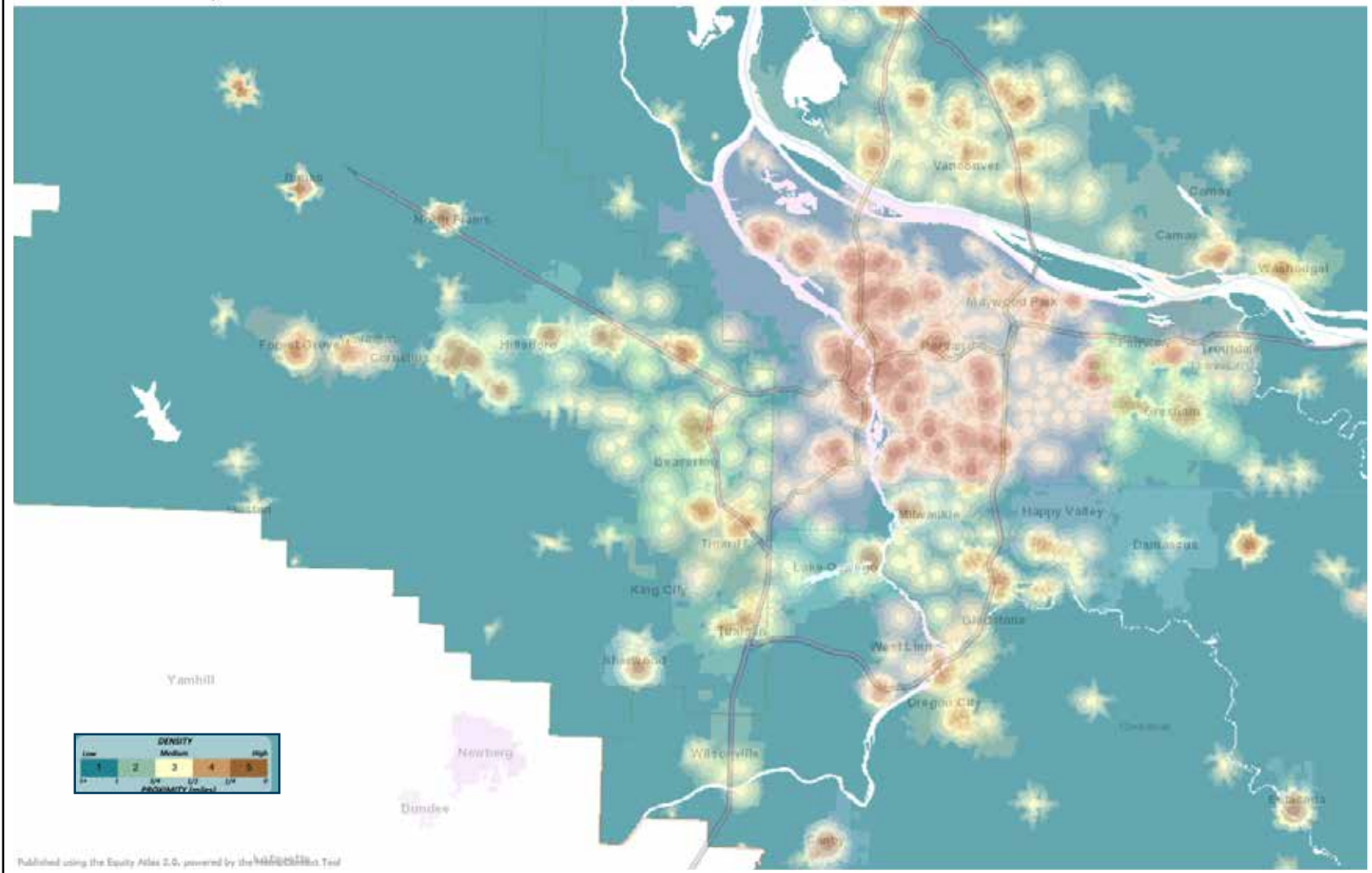
Cultural Equity and Metro’s Desired Outcomes

Cultural Equity is vital to Metro’s desired outcomes because it empowers community members to build connections and resiliency.

It also begins to breakdown the barriers of cultural isolation and exclusion that many individuals in the community face. Empowered, connected, and engaged communities are the pillars of **Vibrant Communities** and a **Prosperous Economy**.

Additionally, cultural support systems that encourage civic engagement will lead to greater participation and deeper discussions on how we as a region can achieve a **Safe and Reliable Transportation** system as well as become a **Leader in Climate Change**.

Access to Healthy Food



Source: Regional Equity Atlas

Note: The map, at left, uses street networks to provide a better analysis of the geographic access to full service grocery stores, produce stands, and farmers' markets to residents than, for example, the point map on page 60. However, because of the lack of data, this map tells us nothing about access to culturally relevant foods.

Unfortunately, data related to culture are rarely collected. High quality data, that can be used to track trends, are those that are considered to be important and priorities. If we believe that cultural equity is important to our region, this lack of data will need to be addressed.

Metro Authority and Influence Over Cultural Equity

Metro has substantial influence over preserving and furthering cultural opportunities in the region.

Through its Portland's 5 Centers for the Arts, Metro provides free cultural space to many local non-profit organizations as well as offers art education programs and field trips for students to attend cultural performances.

Also, Metro owns land and buildings throughout the region that could serve as new locations for future investment in cultural space.

Metro venues such as the Oregon Convention Center and Expo host a variety of cultural and religious programs.

Lastly, Metro administers numerous civic engagement efforts for their variety of programs, policies, and plans that impact future development of the region.



Photo credit: Metro

Definition: *Low-income communities and communities of color deserve the same opportunities as other communities to enjoy clean land, air, water, publicly accessible parks, and protected natural areas.*

Decision makers should *acknowledge that people of color and people living on low-income suffer disproportionately from the cumulative and persistent impacts of environmental burdens, and prioritize the development of a healthy environment where they live, work, play, and pray.*

ENVIRONMENTAL EQUITY: FAIR DISTRIBUTION OF PARKS, NATURAL SPACES, AND ENVIRONMENTAL BURDENS

The negative effects of climate change, poor air quality and hazardous waste directly impact the health of communities exposed to environmental pollution. Communities of color and low income communities are disproportionately burdened by historic and contemporary decisions about “locally undesirable land uses” (LULUs), resulting in increased exposure to associated harms. The location of housing, schools, and services as well as land use policies and dependence on public transit are all factors that determine the extent of an individual’s contact with these burdens.

Additionally, elements such as tree canopy coverage, density of parks, and air quality improvement programs play a critical role in mediating related health risks while also assisting in improving individual well being. Communities that are most vulnerable to the impacts of environmental pollution tend to have both the highest exposure to unhealthy and degraded environments, as well as the highest sensitivity to these elements as a result of poor access to health care and the compounding effects of other environmental and social stresses. These communities should be prioritized for environmental mitigation or health-sustaining natural improvements.

A growing body of research reveals a strong correlation between parks and natural spaces with community health and wellness. For example, trees and vegetation help to reduce air temperatures and absorb air particulates, and increased exposure to nature has been found to have a strong positive impact on mental health. Moreover, close proximity to a park or natural area increases the likelihood of participation in outdoor recreation activities thereby reducing risk of cardiovascular disease and managing blood pressure.

However, accurately measuring and evaluating this indicator is difficult due to deficiencies in available data. These deficiencies

are apparent, for example, in the lack of a comprehensive regional inventory of brownfields – land that is polluted or perceived to be polluted and therefore a barrier to redevelopment. The deficiency in environmental data is also apparent when attempting to examine access to public parks in our region.

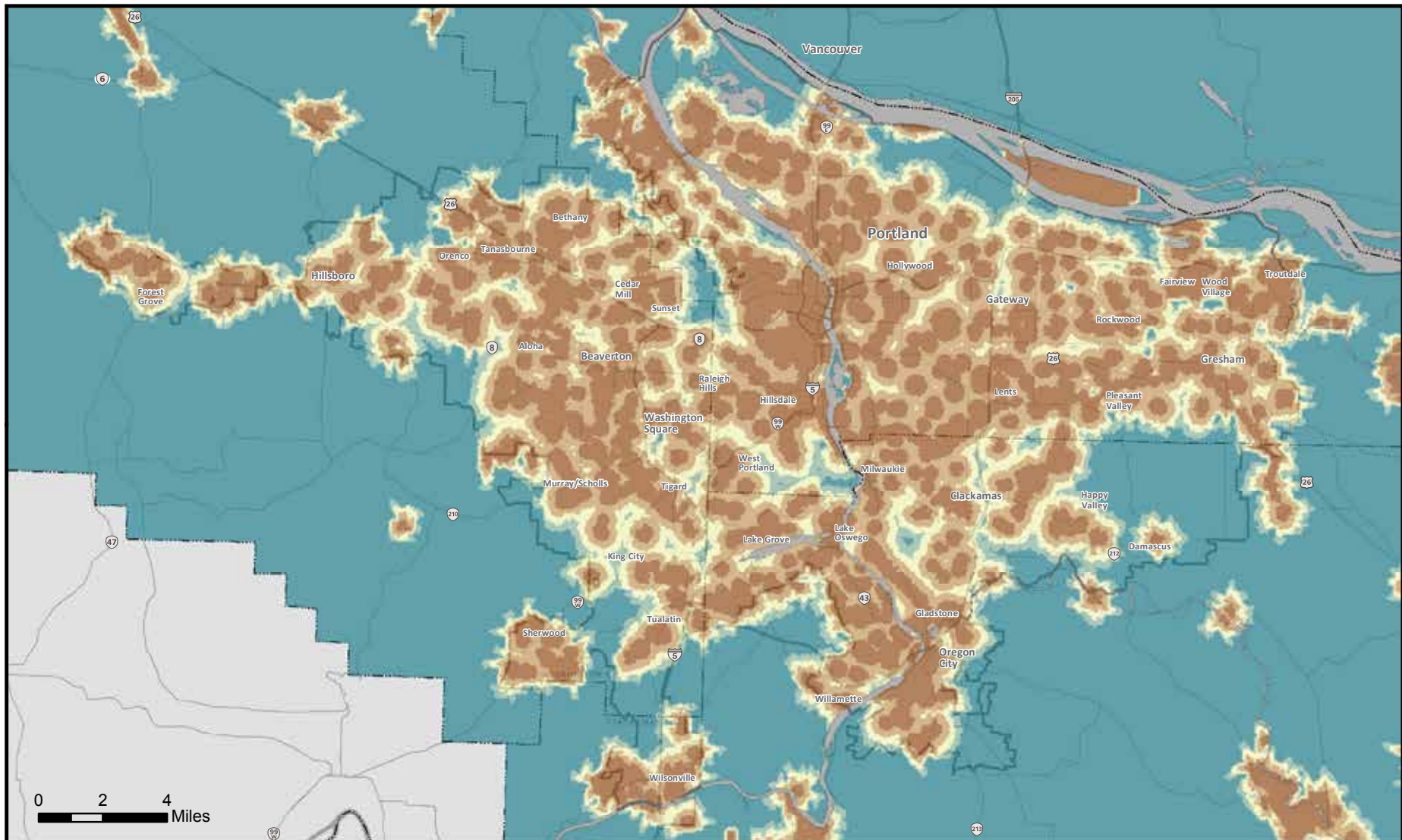
Using currently available data, as displayed in on the map on page 48, public parks appear to be very well distributed throughout our region. However, because of data limitations, the map does not take into account park type, condition, facilities and access points. All parks are not the same, but current data suggest that a very large and well-maintained park such as Laurelhurst Park is equivalent to Mill’s End Park, reputedly the world’s tiniest public park. An improved inventory of items such as park facilities will allow planners to identify areas of deficiency and act accordingly. Therefore, in order to understand the state of environmental equity in the Portland metro region, there must be an investment in data retrieval related to this indicator area.

Environmental Equity and Metro’s Desired Outcomes

Environmental Equity is directly connected to all of Metro’s other desired outcomes. Ensuring opportunities to enjoy outdoor recreation, parks and open spaces are an essential part of achieving **Vibrant Communities**.

Air pollution affects personal health and safety, therefore mitigation efforts that prioritize communities most dependent on active transportation are key to creating **Safe and Reliable Transportation**.

A healthy population is directly correlated with a healthy economy, and for this reason mitigation of these community and individual health burdens must be addressed in order to reach the outcome of **Economic Prosperity**.



Proximity To Publicly Accessible Parks

RLIS ORCA

December, 2014

Primary Source: Metro RLIS

Date: 2014

- Less than 1/4 mile
- 1/4 to 1/2 mile
- 1/2 to 3/4 mile
- 3/4 to 1 mile
- Greater than 1 mile

- Urban growth boundary
- County boundary
- Major road

The information on this map was derived from digital databases on Metro's GIS. Care was taken in the creation of this map. Metro cannot accept any responsibility for errors, omissions, or positional accuracy. There are no warranties, expressed or implied, including the warranty of merchantability or fitness for a particular purpose, accompanying this product. However, notification of any errors are appreciated.
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Note: The map, at left, is an illustration of the inadequacy of the currently available spatial data to analyze equity in relationship to publicly accessible parks.

While it would appear that there is very good access to parks all over the region, the distances that are shown here are not calculated from actual park entries. In addition, the data that are used for the parks do not distinguish between land that is classified as parks but, for example, may not be developed, or is inaccessible (because it is fenced off or is not ADA accessible), or has parking nearby.

Access and use are also related to a sense of belonging and a feeling of safety. Does the park feel exclusive? Does the park feel unsafe either from poor maintenance, poor lighting or visibility, or evidence that would suggest that it is unsafe? Better data would allow us to more accurately represent true access to our public parks.

Metro Authority and Influence Over Environmental Equity

Metro has strong influence over Environmental Equity and has many opportunities to address persistent environmental burdens.

Metro's Sustainability Center purchases, plans, and develops parks and natural areas. The Sustainability Center is also responsible for planning regional multimodal trails such as the Springwater Corridor.

Metro's Planning and Development department works on the remediation of brownfields and, through its Climate Smart Strategy and regional transportation planning, the reduction of air toxins.

Lastly, Metro's venues such as the Oregon Convention Center and Expo Center employ environmental sustainability policies and programs to reduce their environmental footprint.



Photo credit: Portland Parks and Recreation Bureau

Definition: *Persistent regional inequities that result from social, economic, and political exclusion, as well as environmental conditions are the primary determinants of disparate health outcomes.*

Decision makers should *acknowledge the intersectional impacts of these disparities on the health of low-income communities and communities of color, and prioritize both short and long term solutions to eliminating such disparities.*

HEALTH EQUITY: HEALTHY PEOPLE, FAMILIES, AND COMMUNITIES

An individual's zip code is a better predictor of their health than their genetic code. This is due to economic and social factors that are the foundational elements that make up an individual's community. Factors such as the race and income of residents, educational quality of local schools, status of the housing stock, conditions of sidewalks and streets, air quality, level of transit service, and access to healthy food all play influential roles in the health of the surrounding community.

Health research throughout the United States continues to illustrate that the areas with the highest health disparities, highest incidence of chronic disease, and lowest life expectancy are consistently those with high poverty and concentrations of nonwhite residents. This highlights the fact that, not only do low-income communities and communities of color tend to have the least access to neighborhoods that encourage healthy living, their neighborhoods have historically been the lowest priority for public investment.

Our region mirrors national research on this subject, as communities of color and low-income communities experience distressing health disparities related to morbidity, mortality, clinical care, and health behavior. To emphasize the urgency and extent of this issue, the Multnomah County Health Department recently released a report measuring 33 key health indicators by race. Of the 33 indicators, 27 indicators show that Multnomah County's Black/African American community fares significantly worse than its White community. Additionally, for many of the indicators where the Black/African American community is experiencing health disparities, the Multnomah County Health Department has determined the need for immediate intervention.¹⁰

¹⁰ Multnomah County Health Department. (2014). *Report Card on Racial & Ethnic Disparities: Executive Summary*. Retrieved on December 13th, 2014 from http://media.oregonlive.com/portland_impact/other/ReportCardonRacial&EhtnicDisparitiesExecSummary.pdf

An example that illustrates this issue can be seen in the Rate of Diabetes map (page 52), which highlights the relationship between chronic disease and poverty. The image shows type II diabetes rates in relationship to the percent of public school students eligible for free or reduced price lunch, a well-accepted proxy measure for student poverty. As can be seen throughout the region, higher rates of diabetes are correlated to high levels of student poverty.

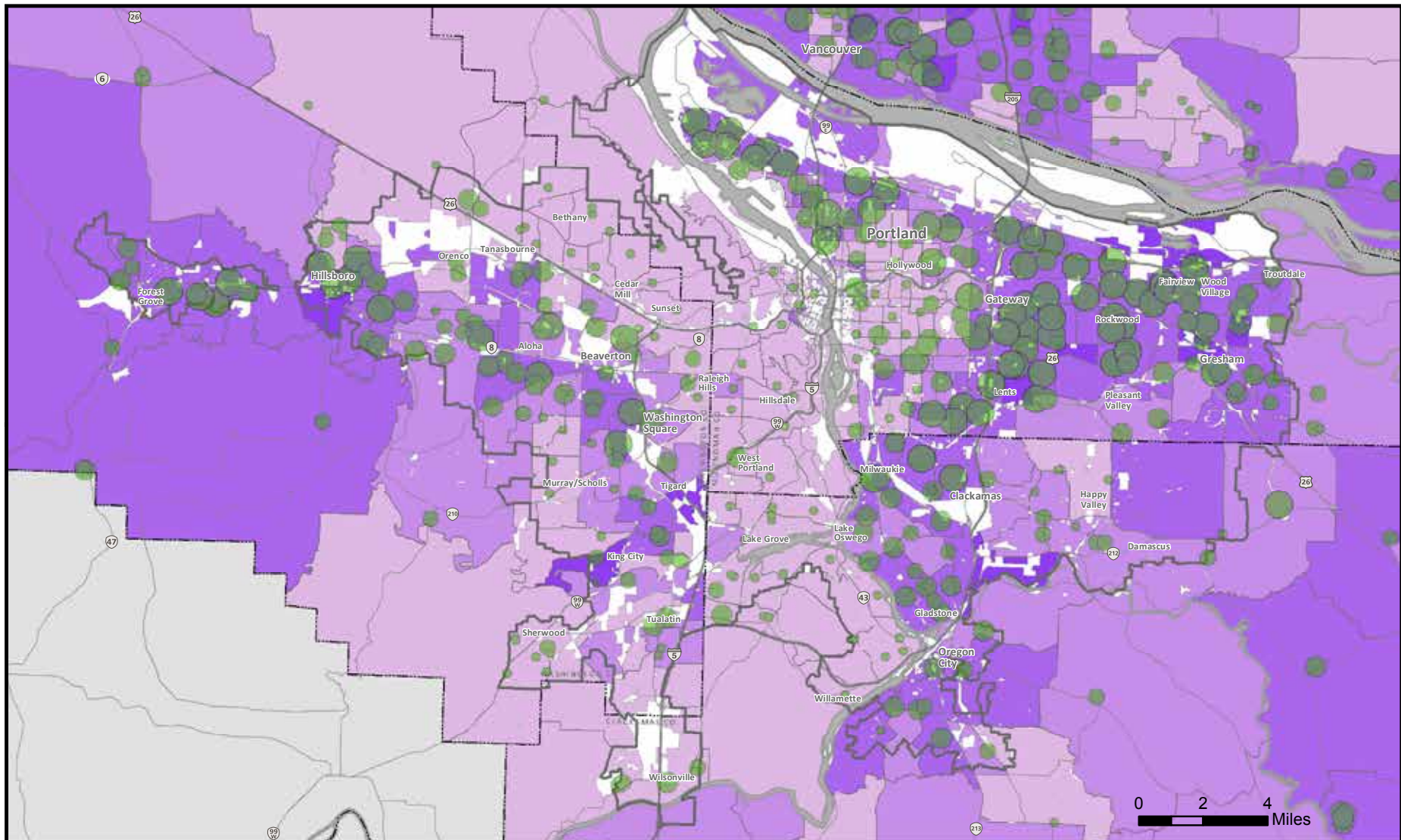
Health Equity and Metro's Desired Outcomes

Metro's five other desired outcomes all play a part in creating a healthier region.

Vibrant Communities are communities that enjoy a high quality of life and healthy outcomes.

Safe and Reliable Transportation is required to ensure that people can fully enjoy the communities and region in which they live, as well as use active transportation that helps improve health.

Clean Air and Water is a major determinant of disparate health outcomes, and **Leadership on Climate Change** will reduce many of the environmental and other burdens faced by people living on low income.



Rate of Diabetes; Percent of Students Receiving Free & Reduced Price Lunch

Intermediate Source: Equity Atlas

Primary Source: Oregon Health Care Quality Corporation insurance claims

Date: 2011

Percent Free & Reduced Lunch

- 2 - 30%
- 31 - 45%
- 46 - 70%
- 71 - 95%

Rate of Diabetes (census tract)

- 0 - 6.1%
- 6.2 - 7.8%
- 9.7 - 11.5%
- 11.6 - 19.7%
- Data Not Available (999)
- Unpopulated area

- Urban growth boundary
- - - County boundary
- Major road

The information on this map was derived from digital databases on Metro's GIS. Care was taken in the creation of this map. Metro cannot accept any responsibility for errors, omissions, or positional accuracy. There are no warranties, expressed or implied, including the warranty of merchantability or fitness for a particular purpose, accompanying this product. However, notification of any errors are appreciated.
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Note: The map, at left, depicts diabetes rates for the insured population (including the Oregon Health Plan) by Census tract in relationship to the percentage of students receiving free and reduced priced lunches (often used as a proxy for poverty) by schools.

Reflecting the literature, that suggests that poverty is a key determinant of health outcomes, there appears to be a relationship between poverty and the incidence of diabetes in our region.

This map was made possible by the significant and long-standing commitment to equity analysis by the Coalition for a Livable Future. Understanding the significance of the social determinants of health to equity, CLF obtained a Robert Wood Johnson grant to support the aggregation of actual health record data for three chronic diseases in our region. Prior to this only self-reported survey data was used for this type of analysis at the county level.

Metro Authority and Influence Over Health Equity

Metro's projects and programs have direct influence over structural factors such as housing, education, transit, and economic development that go into making healthy neighborhoods.

For example, the Sustainability Center has worked to reduce asthma rates by decreasing the emissions of the garbage collection trucks in parts of North and Northeast Portland.

Metro's Planning and Development department impacts physical activity levels through its influence on the region's commitment to active transportation.

Metro's role in creating a regional park system also promotes active and healthy lifestyles more generally.

And Metro assists with childcare services for its employees, which affect the stress burdens of families.

Beyond having influence over structural factors, Metro also has authority over many programs that have immediate impact over health behaviors. For example, many of Metro's venues such as the Oregon Convention Center and Expo Center host wellness events and have non-smoking or healthy food policies.

Also, Metro's Bike There! maps and other Regional Transportation Options programs help to make active transportation an easier choice for more people.

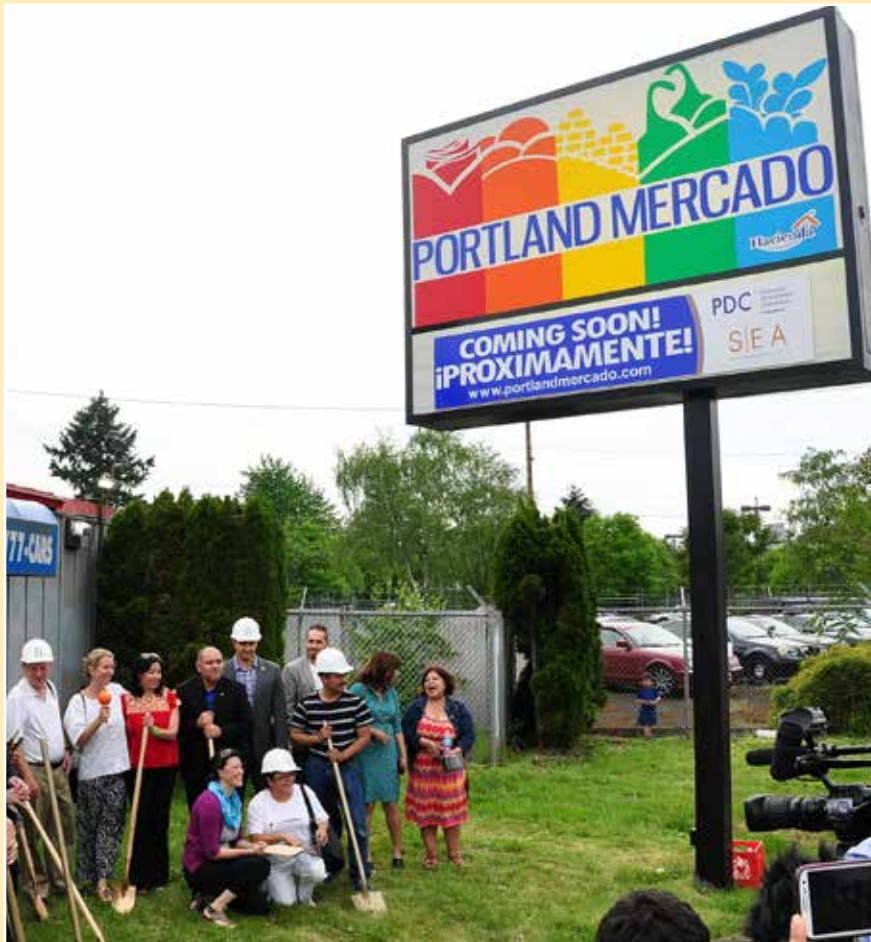


Photo credit: Hacienda Community Development Corporation

Definition: *Persistent forms of employment discrimination, as well as the lack of small business support, fair access to economic capital, local hiring practices, job training programs, living wages, and other barriers to wealth accumulation in marginalized communities entrench regional inequity and reduce economic growth.*

Decision makers should *acknowledge the cumulative and contemporary impacts of economic exclusion, and support policies that affirmatively promote the upward mobility and human dignity of historically marginalized people.*

ECONOMIC EQUITY: FAIR EMPLOYMENT AND ECONOMIC PROSPERITY

Our region is becoming increasingly separated into the haves and have-nots. Many people have lost their jobs and homes during the Great Recession while the net wealth of many of our wealthiest residents continues to grow. While unemployment rates have nearly recovered to pre-recession levels, wages have not. Many communities are falling increasingly behind and no longer have the financial ability to choose where they are able to live, work, and socialize leading to the suburbanization of poverty.

Communities of color and immigrants face employment discrimination that prevent them from tapping into their full economic potential, even if they are qualified in their countries of origin. Lack of support for new entrepreneurs, inadequate job training, and insufficient wages that require many to work multiple jobs to support their families are barriers to wealth accumulation that entrench and exacerbate inequity.

Economic equity addresses the ability of families to meet basic needs and also the widening wealth gap and pressures on middle class families. We must ensure that economic prosperity for some does not set certain communities behind and help address increasing wealth gaps in communities of color and other communities facing persistent headwinds in their ability build wealth.

Our region is becoming increasingly unaffordable, while racial wealth disparities seem to be increasing. One measure of whether families are able to make ends meet is the self-sufficiency standard (see graph on page 56).

The self-sufficiency standard is the income a family needs to make ends meet without extra income supports (e.g., public housing, food stamps, Medicaid, or child care) and without private or informal assistance (e.g., free babysitting from a relative or friend, shared housing, or food provided by churches or local food banks).

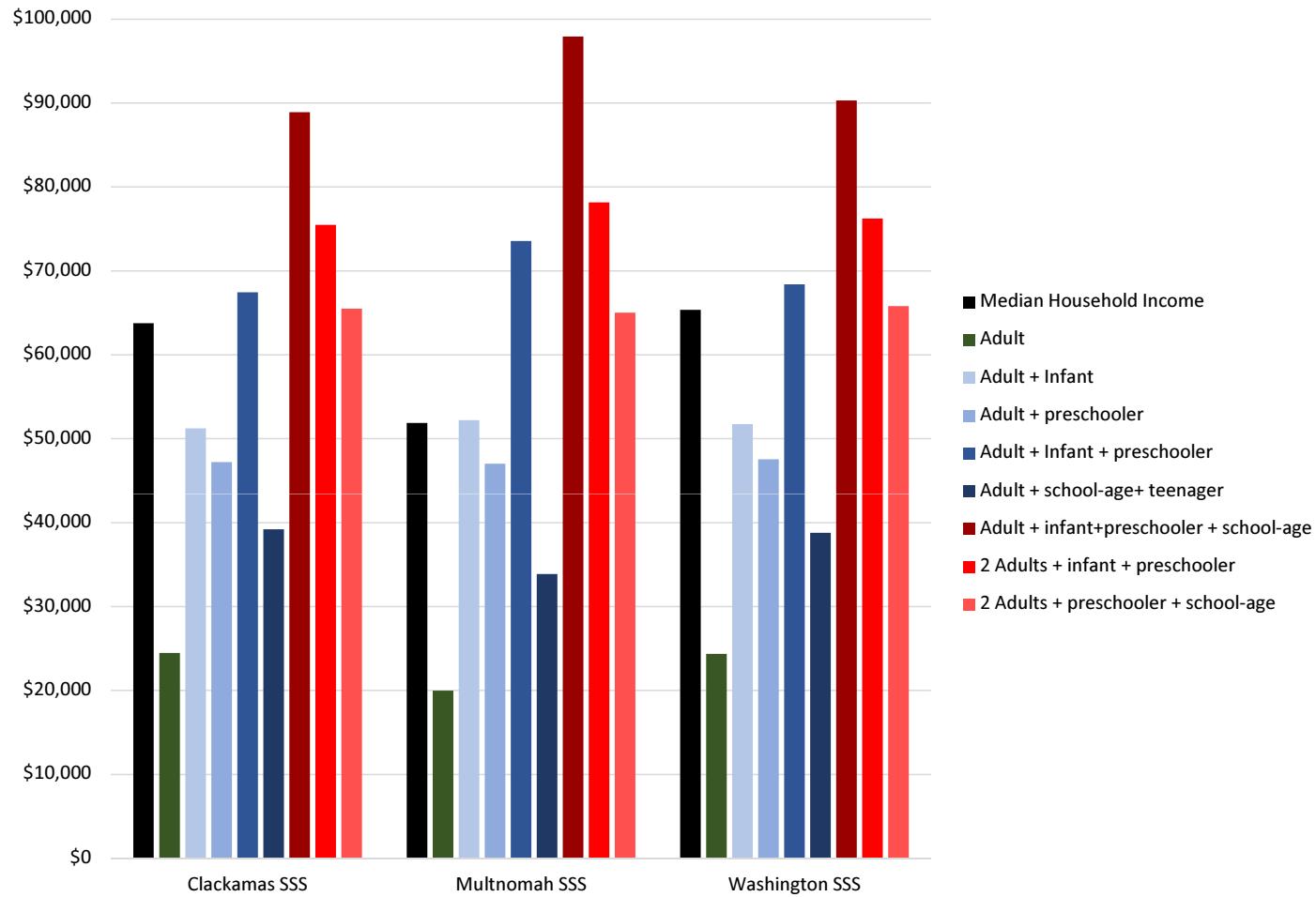
Self-sufficiency has long been assessed by local, regional, and state authorities using the Federal Poverty Level. Unfortunately, this standard fails to recognize the reality and experiences of low-income families or consider variation in local cost of living. Households not earning enough income to meet their basic needs must do without important services such as health care, adequate housing, and healthy food, but many families facing economic distress are routinely overlooked because they do not fall into the standard definition of “poor” as defined by the Federal Poverty Level.

The new self-sufficiency standard helps redefine our understanding of those not able to meet their basic needs by basing its calculations on a more comprehensive set of household expenses, which include food, child care, transportation, and taxes.

As one can see (page 56) median family income does not come close to meeting the needs of families in our region. Particularly for those with preschool and school-age children, median family incomes do not come close to meeting costs, and many in our community face economic insecurity.

This is especially true of communities of color. According to Greater Portland Pulse, there are serious racial/ethnic disparities on income. The median household incomes of Black households and Hispanic households in the Portland region are less than two-thirds that of white households, and the annual per capita income of Black residents is, on average, less than two-thirds of white residents, while the per capita income of Hispanic residents is less than half that of white residents. Unemployment and homeownership statistics show similar patterns.

Self-Sufficiency Standards and Median Household Incomes by County



Source: Greater Portland Pulse

Economic Equity and Metro's Desired Outcomes

Economic Equity is central to Metro's other desired outcomes.

Ensuring that people are able to meet basic needs and build wealth for the future is an essential part of achieving **Vibrant Communities** across our region. If families are struggling, they are not able to contribute to the vibrancy of our community and pockets of poverty will become increasingly concentrated.

Safe and Reliable Transportation is also part of Economic Equity, as members of our community need to be able to get to work affordably, reliably, safely, and on time.

Clean Air and Water are denied to people whose economic means are limited to areas near major roadways, industry and other sources of pollution.

Finally, **Leadership on Climate Change** requires a region in where people have the ability to choose to live near the places they must go, and therefore reduce the environmental impacts of transportation and other land use decisions.

Metro Authority and Influence Over Economic Equity

Metro has control over the economic well-being of residents in our region both directly and indirectly.

Most directly, Metro employs nearly 800 people as well as seasonal or temporary employees. It has direct power in contracting and supporting minority owned businesses for its projects. Both are opportunities to model best practices in employing and requiring contractors to pay living wages and provide benefits, thus allowing those who work directly or indirectly for Metro to prosper.

Additionally, Metro has indirect influence over the prosperity of the region by planning equitable transportation options, supporting affordable housing, and developing other strategies to support low-income communities in regional plans and policies.



Photo credit: Hacienda Community Development Corporation

Definition: *The disappearance or lack of access to affordable, nutritious, and culturally appropriate food sources in low-income communities, rural communities, and communities of color reinforce regional health and economic disparities.*

Decision makers should *prioritize food options that meet the needs of community members and acknowledge that food choice and security involves more than simple proximity to stores and farmer's markets.*

FOOD EQUITY: AFFORDABLE, NUTRITIOUS, AND CULTURALLY APPROPRIATE FOODS

Nutrition is one of the most important determinants of community health, which in turn promotes individual health. For many in our region, healthy nutritious food is difficult to access because of location and transportation challenges. In many low-income communities and rural areas, grocery chains have left or never opened stores in the first place.

Even for those who do live close enough to food markets, many do not have the financial means to afford healthy food. Many also do not have the time or are educated about nutrition in order to improve their diets.

A diversifying region must also recognize the importance of culturally specific foods and traditions, and support immigrant communities in growing or finding access to such foods to support the preservation of an important aspect of their cultural heritage.

Moreover, food equity benefits the entire region. Fewer instances of chronic disease, such as diabetes, provide a health and economic boon not only for the individual, but also for our regional economy as a whole through improved productivity and savings on health care.

Food equity is an area where further data collection is essential and presents the opportunity to partner with other organizations and companies that collect relevant food related data for other purposes. A more detailed discussion of this issue is included in Appendix A of this report.

The map, on page 60, provides some general context and evidence that low-income areas of our region lack adequate access

to farmer's markets, produce stands, and full service grocery stores. Indeed nearly all farmer's markets and produce stands are concentrated in more affluent areas.

Food Equity and Metro's Desired Outcomes

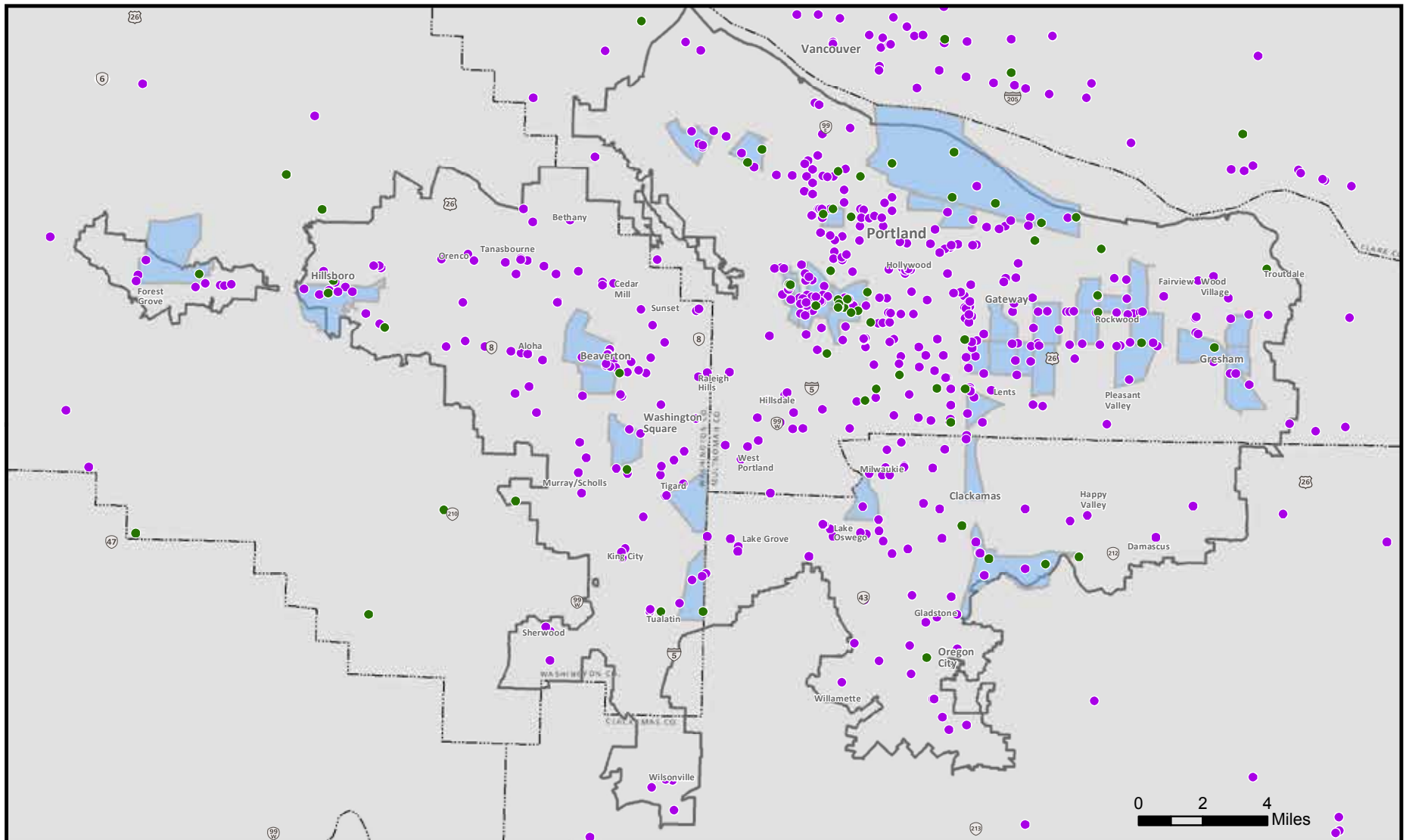
Food equity is uniquely tied to Metro's five other desired outcomes, as nutritious diets are intricately tied to healthy outcomes.

To achieve **Economic Prosperity**, our region must not require low-income families to work numerous jobs in order to be able to afford and have time to prepare nutritious food, and food security contributes to a healthier and more economically productive region.

Food equity is also closely tied to a clean environment, as **Clean Air and Water** and healthy ecosystems are absolutely vital to a community's ability to grow its own food.

Leadership on Climate Change is strongly tied to our current food consumption habits, as environmental degradation associated with intensive growing and long-distance transportation of food is a major contributor to climate change.

Safe and Reliable Transportation is vital for access to food, both for the consumer and in the transportation of food itself. And finally, food security, access, affordability and diversity all contribute to a **Vibrant Community**.



Farmer's Market's, Produce Stands, and Full Service Grocery Stores; Below Regional Median Income Tracts

Intermediate Source: Equity Atlas
 Primary Source: ESRI Business Analyst; 2010 Census
 Date: 2012

- Farmer's Markets and Produce Stands
- Full Service Grocery Stores
- Census Tracts with Median Income below 200% Poverty Level (\$39,580)
- 2010 Census tracts

- Urban growth boundary
- County boundary
- Major road

Note: The map, at left, displays the locations of farmers' markets, produce stands, and full service grocery stores with the Census tracts with below the regional median household incomes. This sort of mapping is commonly used to identify food deserts, or places where access to healthy food is poor.

While it appears that there is some level of geographic proximity to healthy food outlets in all of the lower income Census tracts, the map is inadequate to convey other dimensions of access such as: the cost of the food; the quality of the food; the hours of operation for the grocery stores and produce stands, or the months, days, and hours for farmers' markets; or the availability of culturally appropriate foods.

Metro Authority and Influence Over Food Equity

Metro has little direct influence over food choice and security, but many of its policies and programs do have potentially significant impacts on food access.

Through its transportation and land use planning, Metro helps determine whether residents have easy access to nearby grocers, gardens, and farmer's markets.

Metro's urban growth management decisions also directly affect farmland and the region's food systems.

Finally, Metro venues like the Expo Center and Oregon Convention Center host food-related events and feature food concessions.

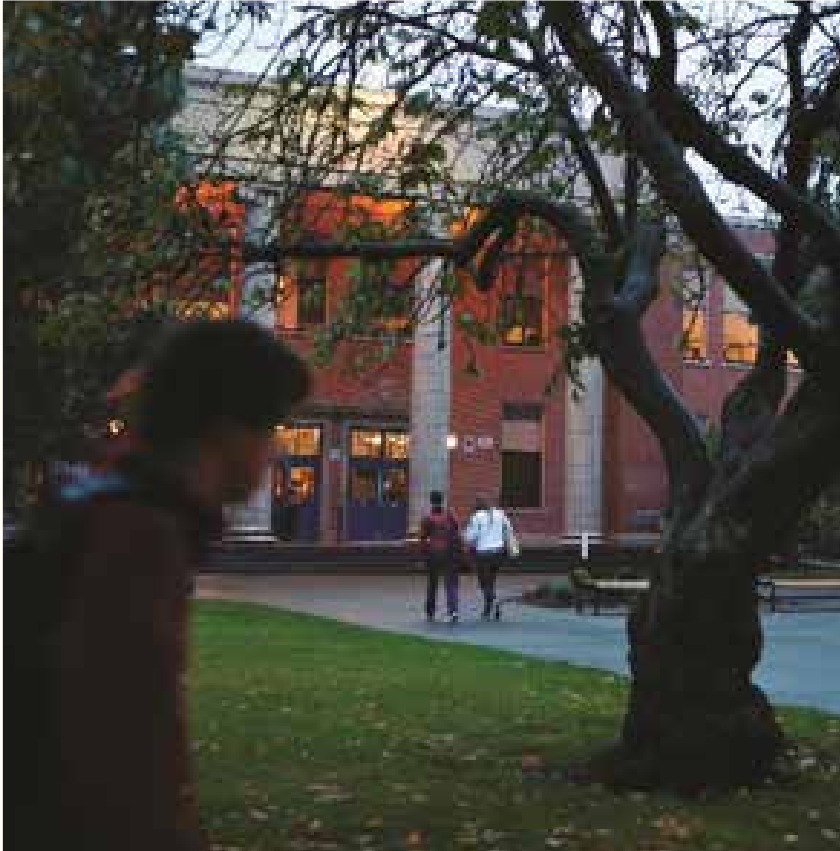


Photo credit: Metro

Definition: *Educational attainment is one of the strongest predictors of health outcomes, economic prosperity, and social capital, and persistent barriers to education faced by people of color and people living on low-income amplifies regional disparities.*

Decision makers must *understand the institutional, economic, social, and political barriers to education, as well as provide adequate funding and programmatic support for traditional and non-traditional students.*

EDUCATION EQUITY: ATTAINMENT OF QUALITY EDUCATION

Educational attainment is one of the single strongest predictors of an individual's future well-being. Success within the American academic system leads to pathways out of poverty, access to family wage jobs, better health outcomes, and greater life expectancy. Yet communities of color fare significantly worse than white communities in our region in outcomes such as graduation rates, absenteeism, achievement gaps, dropout rates as well as discipline rates.

But educational inequities extend beyond the classroom. Issues such as hunger, the stress of poverty, lack of physical activity, insufficient childcare services, and unreliable transportation also impact a student's ability to achieve academically. Again, students of color experience these barriers at a higher rate than their white counterparts.

Problems outside the classroom are compounded by disciplinary inequities inside our schools. Black females, for example, are six times as likely to be suspended from school and twice as likely to be living in poverty than white female classmates.

Our region faces major disparities in higher education as well. People of color in our region attain college degrees at a rate less than one-quarter that of whites, inhibiting their upward mobility and significantly limiting their average income.

Unfortunately, these disparities have become so normalized in our academic system that we have begun to establish different measures of achievement based on race (see the Oregon Department of Education graduation targets on page 64). The creation of separate measures minimizes the true extent of the problem at hand and draws attention away from its urgency.

Education Equity and Metro's Desired Outcomes

Education directly impacts all five of Metro's other desired outcomes.

Reducing dropout rates and increasing access to high quality education directly contributes to the creation of **Vibrant Communities** and **Economic Prosperity** in our region.

But in order to access education, students depend on having **Safe and Reliable Transportation**.

Leadership on Climate Change requires innovations and the development of our next regional leaders, both of which are dependent on our education system.

The impact of **Clean Air and Water** on student health is a major factor in student achievement.

Metro Authority and Influence Over Educational Equity

Metro has a considerable amount influence over regional educational opportunities.

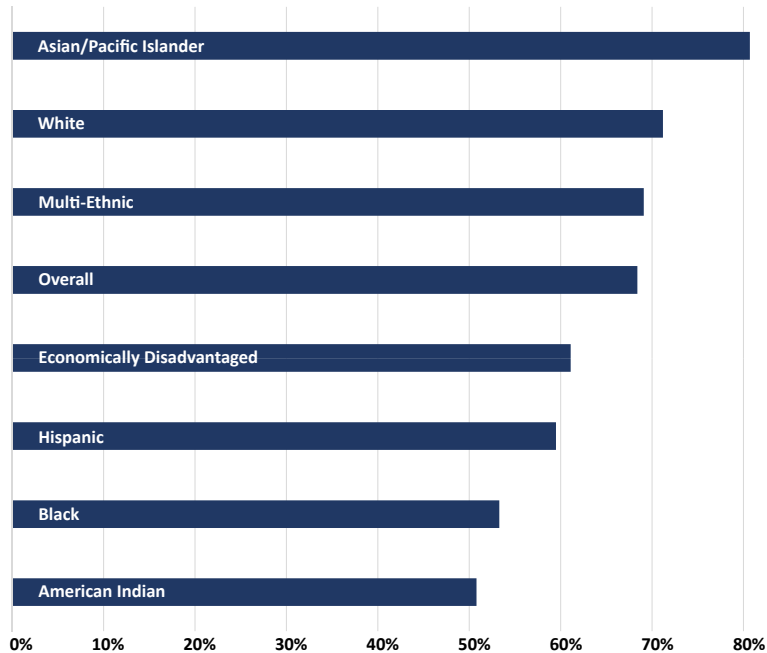
Metro administers many childhood education programs and, through its Portland's 5 Centers for the Arts, provides educational theater and writing programs, raises academic scholarship funds for local youth, and provides field trips for students to attend cultural performances.

Metro also hosts a variety of educational presentations as well as manages job training opportunities.

Lastly, many of Metro's venues such as the Oregon Convention Center and Expo host educational programs and activities.

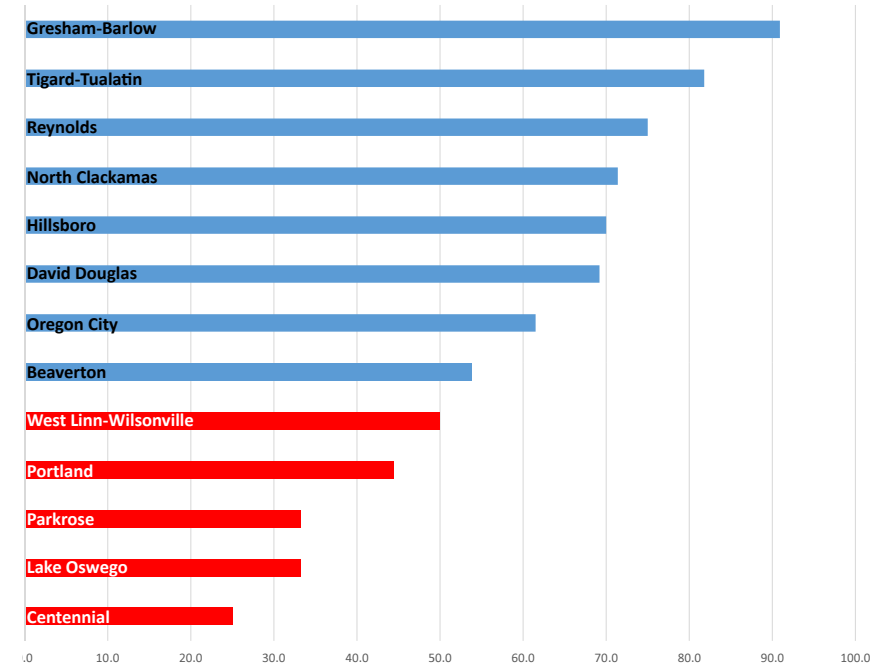
4-Year Cohort Graduation Targets and Rates by Race, Ethnicity, and Poverty for 2012-2013

Oregon Targets: 4-Year Cohort Graduation Rates by Race/Ethnicity/Poverty

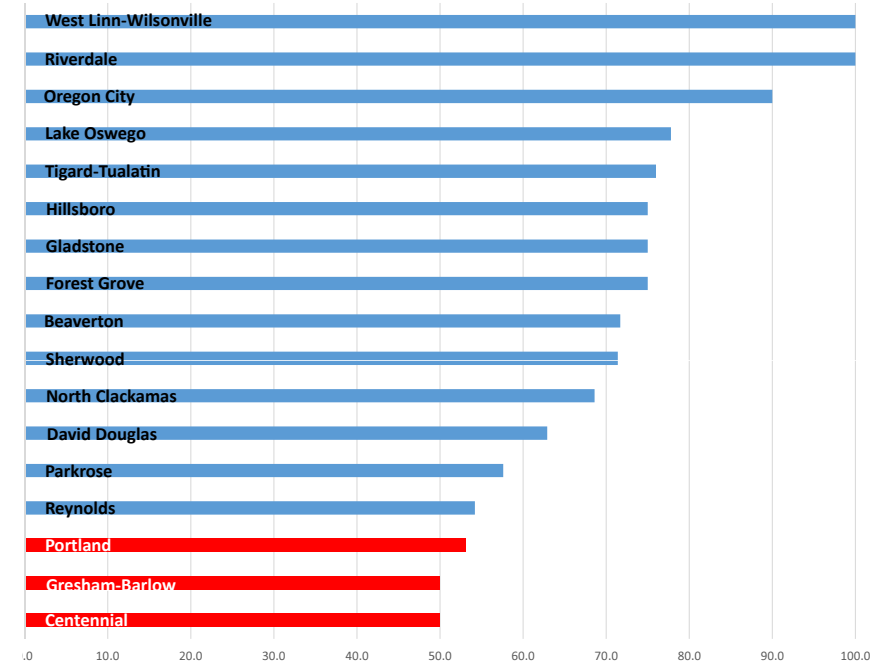


Note: The racial and ethnic categories that are widely used, and are used in these statistics, are extremely broad and often mask the discrepancies in performance of the populations within them.

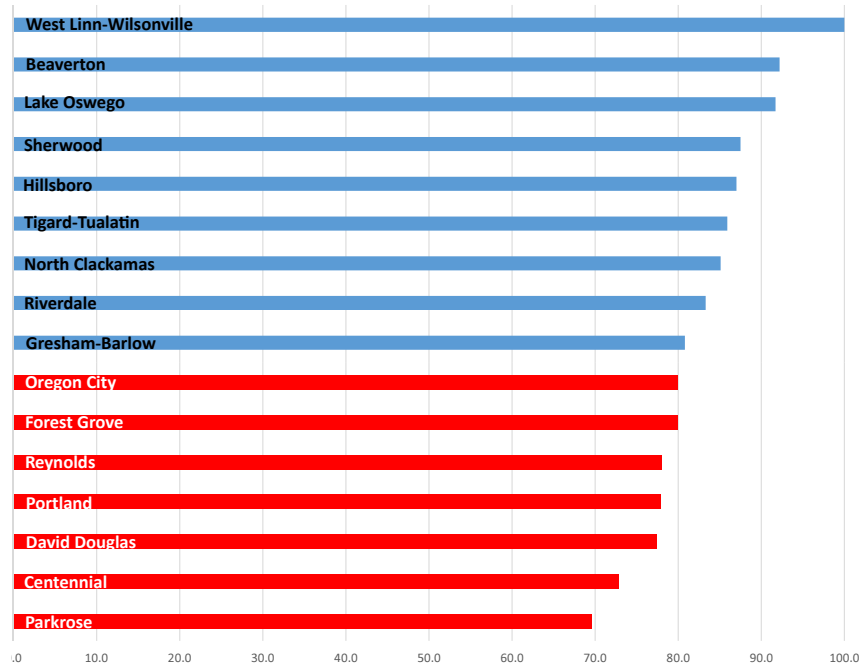
American Indian 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



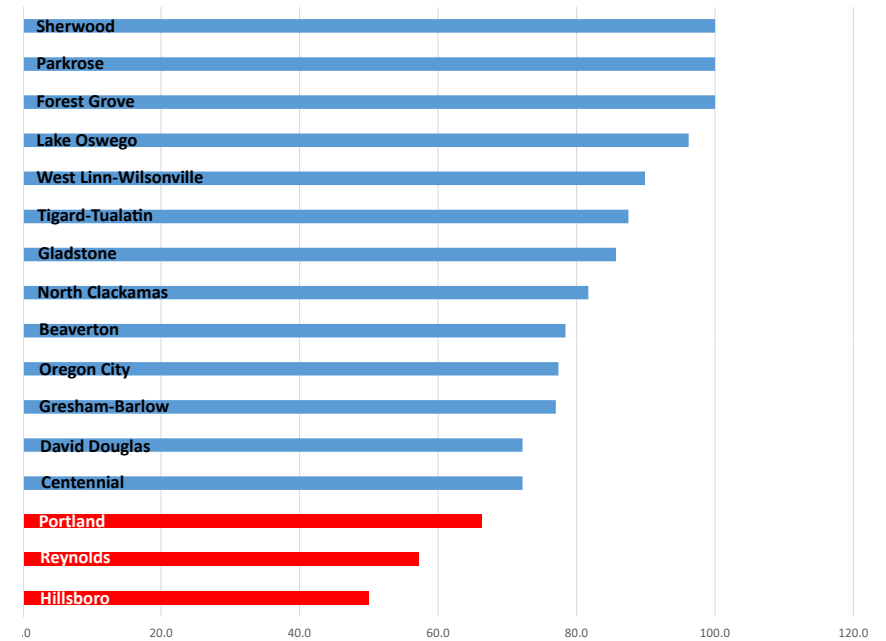
Black 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



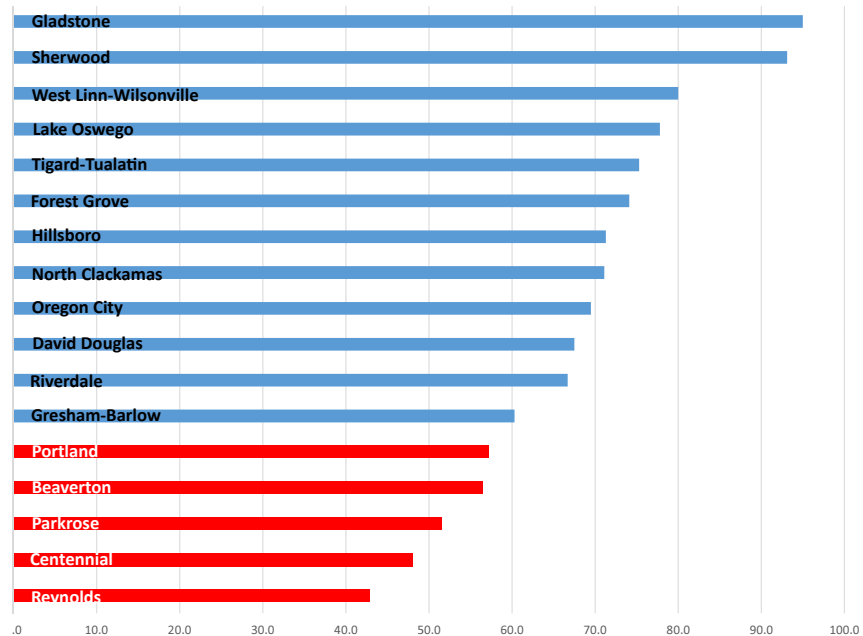
Asian/Pac Islander 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



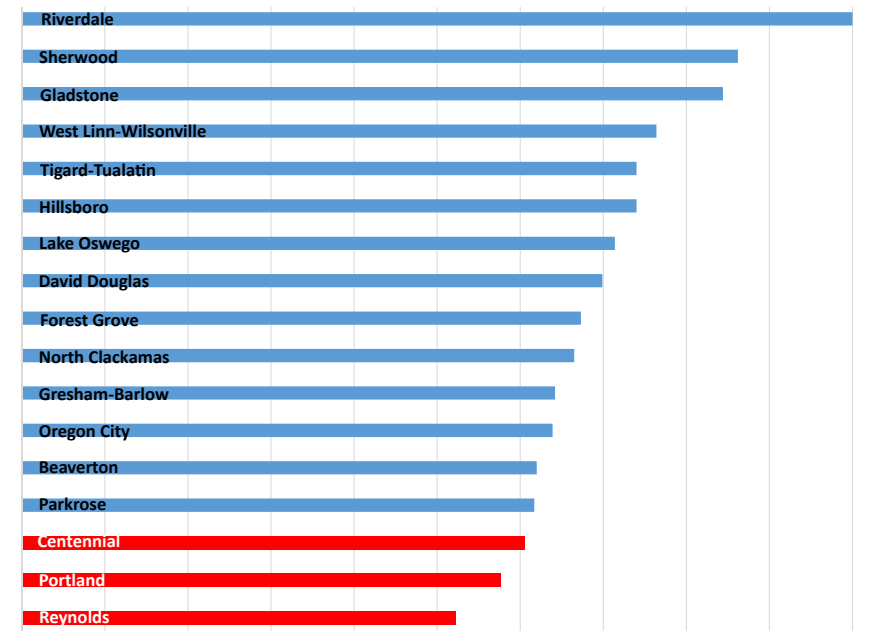
Multi-Ethnic 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



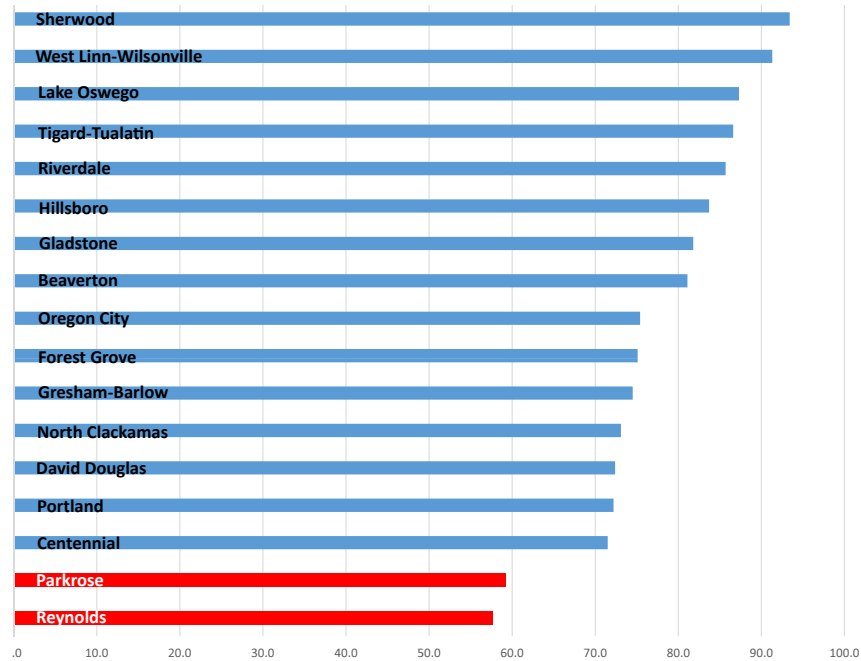
Hispanic 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



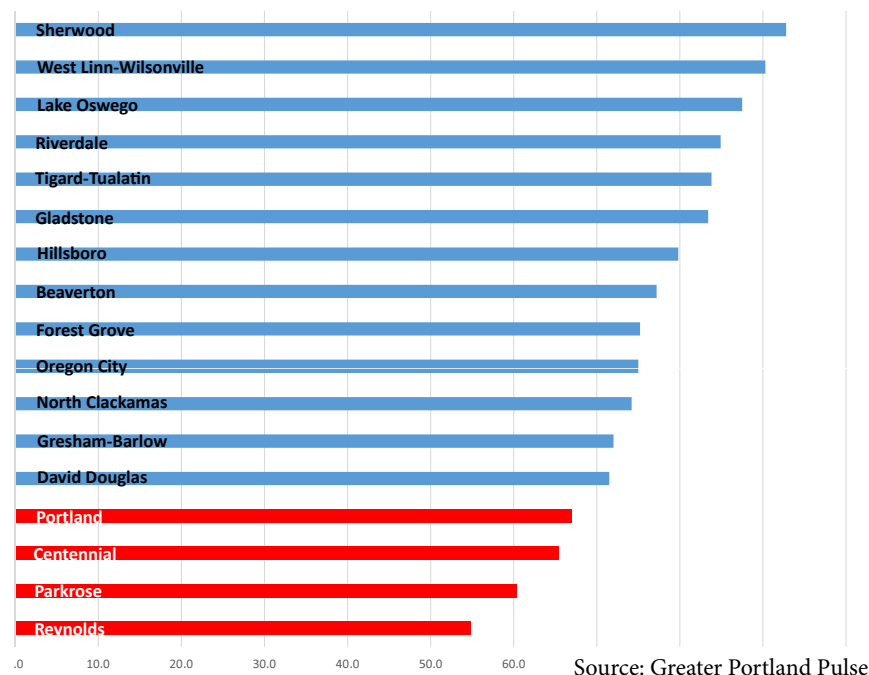
Economically Disadvantaged 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



White 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



Overall 4-Year Cohort Graduation Rates: Meets (blue)/Doesn't Meet (red) State Target



Source: Greater Portland Pulse



Photo credit: Urban League of Portland

Definition: *Marginalized communities need institutions, relationships, and representation that nurture and support the development of their social capital, which allows them to meaningfully influence public policy and priorities.*

Decision makers should *acknowledge the social, historical, and institutional barriers that exclude these communities from the decisions that most impact them, provide resources to build community capacity, affirmatively promote inclusive engagement that is early and often enough to be meaningful, prioritize community identified needs and solutions.*

MEANINGFUL ENGAGEMENT AND EMPOWERED COMMUNITIES

Meaningful engagement encompasses more than just voter registration and turnout rates. While voter registration and participation are important, truly meaningful engagement brings the voices of those most impacted by public policies to the decision making table, and ensures that they are included, heard and understood, and that they drive outcomes.

Marginalized communities, particularly immigrant, refugee, and low-income communities do not play on an even social and political field, with more connected groups in advocating for their own interests. This limits their access in terms of health outcomes, education, housing, employment, transportation, and other opportunities outlined in this report.

There are a number of intertwined social, historical, and institutional barriers that exclude these communities from the political process. For example, immigrants and refugees in our region may experience language and cultural barriers that prevent them from contributing their ideas and energy.

Many historically marginalized people face similar barriers to public engagement and public processes. Public meetings may not be publicized to their communities in appropriate ways. Meeting and engagement opportunities may be held when they are working, or at government facilities in which they do not necessarily feel comfortable. Childcare, interpretation, and transportation may not be provided.

Leaders from marginalized communities – while deeply connected to and knowledgeable about the communities they represent – may not be informed about the structure, mission, jurisdiction or decision-making process of Metro. They are also less likely to have relationships with elected leaders, government staff, or other decision makers.

Community leaders who do get involved keenly experience differences in power dynamics. Many report feeling marginalized and tokenized by the process, or irrelevant because key decisions were already made before their involvement. Communities who have suffered historical exclusion, as well as new immigrant and refugee communities, often come to the table with a measure of ingrained mistrust of government based on previous experiences. Power imbalances, inauthentic processes, and tokenization serve to further isolate communities and reify this mistrust which ripples throughout the community.

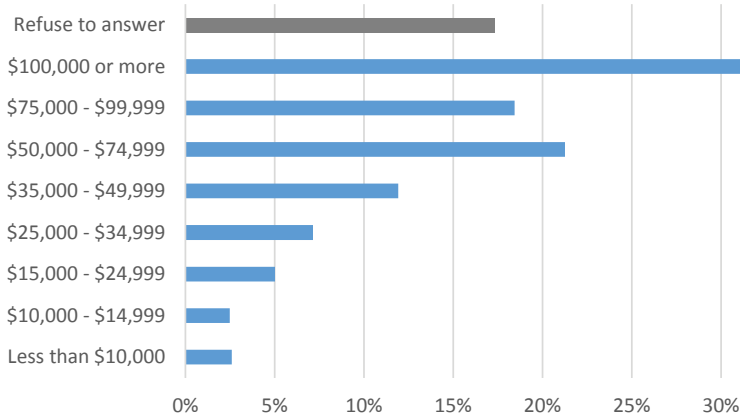
Leaders from historically underrepresented communities likewise feel the pushes and pulls of many government agencies on their time and resources. Overburdened with both the needs of the community they represent and the importance of their perspectives in public policy settings, leaders are forced to prioritize involvement, deciding between competing projects and diluting their impact. Investment in leadership development by Metro and other government agencies could help alleviate this.

Without equal investment in community capacity at the grassroots level, meaningful engagement is likely to fall short, turning potential leaders into “gatekeepers.” Immigrants, refugees, people of color, and low-income community members often require new knowledge, tools, and experience to learn the ways in which their ideas for change can be manifest. Often, the best curriculum for building grassroots community capacity is developed within the community-based organizations that understand their respective constituents.

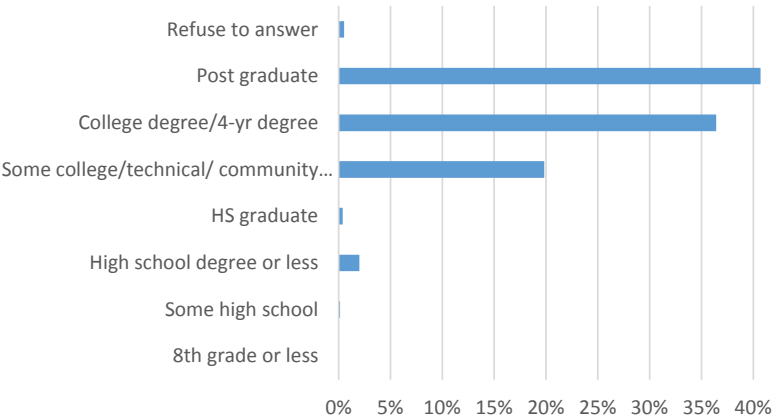
All these are examples of missed opportunities that continue to exclude historically marginalized communities. In contrast, mainstream communities are better equipped with the knowledge, connections, and experience to have their demands heard. The demographic breakdown of recent participants in Metro’s

Demographics of Metro’s Opt-In Active Participants (last 2 years)

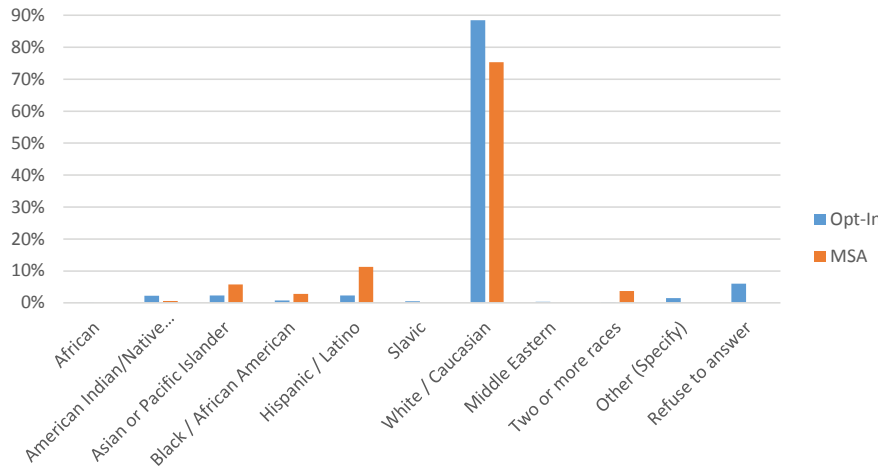
Respondents’ Household Income Before Taxes



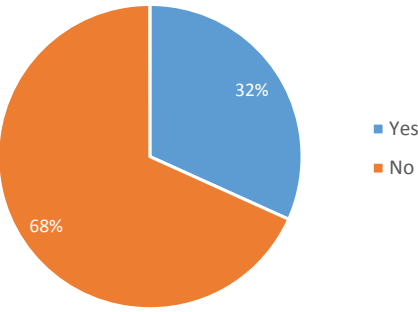
Highest Level of Education



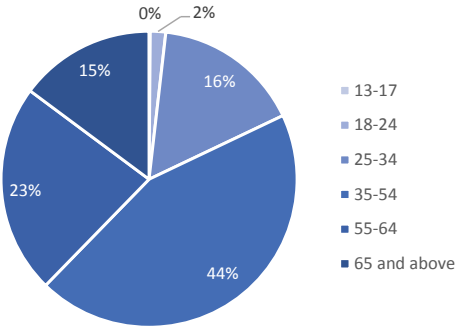
Respondents’ Race/Ethnicity



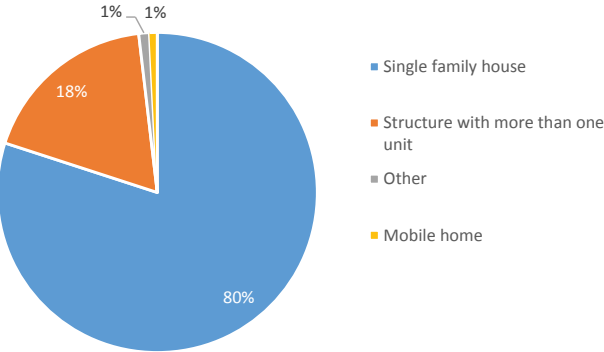
Children Under 18 in Household



Respondents’ Age



Respondents’ Housing



Note: While online surveys have the potential to reach large numbers of people, many are left out. For example, the participants in Metro’s recent Opt-In surveys suggest that White, higher income, and highly educated residents are overrepresented, as are households without children.

Source: Metro

online Opt-in Survey, which informs regional policies and priorities, illustrate the difference between community members, and show how white, more affluent, and more educated residents of our region are disproportionately represented in these important public opinion surveys (see page 70).

Meaningful Engagement and Metro's Desired Outcomes

Empowered communities are vital for all of Metro's desired outcomes. People must be civically active and participate in the political process to create **Vibrant Communities**. A community cannot be vibrant if some of its people are kept in the dark.

Safe and Reliable Transportation requires that those who are most dependent on public transportation must be allowed to meaningfully weigh in on transportation choices.

Economic Prosperity is critically linked to meaningful engagement, as economic burdens and benefits are often distributed through the political process.

Clean Air and Water and Leadership on Climate Change require collective action from all communities, not just the wealthy and well-connected. Marginalized communities must be brought into the decision making process and develop new leadership to help tackle the challenges of our times.

Metro Authority and Influence Over Meaningful Engagement

While Metro has little direct influence or authority over voter registration rates and turnout, it has full control over its own public engagement practices. Nearly every planning and parks project or program involves public engagement to some extent, and Metro can determine what approach it takes in these processes, as well as encourage agency partners to not only prioritize but demonstrate meaningful engagement. Finally, Metro controls numerous properties including parks, convention space, and other facilities. These assets are opportunities to provide space for both Metro- and community-led meetings.

Metro can model best practices for empowering communities to participate in the decision-making process through its efforts to reach out to marginalized

communities. Metro can engage these communities early enough in the process to meaningfully change policies and outcomes, and make longer-term investments to build capacity and expand engagement.

Metro's Equity Baseline process is worthy of special note in this respect, as it was a positive step towards meaningfully engaging community members and representatives from the beginning of the process. It allowed the process to evolve over time in response to community feedback, and provided resources to support longer-term engagement on Metro's equity strategy. This responsive process has not only provided stronger outcomes for Metro, but also built capacity within community groups to become stronger advocates at Metro in the future.



Definition: *Crime prevention and harm reduction must address community-level outcomes by focusing on short and long-term problem solving, restoring and supporting survivors, strengthening normative standards, and effectively rehabilitating and reintegrating offenders to break cycles of poverty and the disenfranchisement of people of color.*

Decision makers should *acknowledge the persistence of racial and ethnic discrimination in our approaches to crime prevention, and prioritize community-based solutions and survivor support.*

RESTORATIVE JUSTICE: COMMUNITY AND SURVIVOR SUPPORT

Crime results from the persistent exclusion of communities or individuals from their fair share of social, economic, and political power. This is primarily the consequence of disparate treatment and outcomes that marginalized people experience in housing, employment, education, transportation, and each of the other equity indicators identified in this report. Consideration of the impacts of crime prevention and enforcement efforts is thus a unique but essential component of any meaningful equity framework and strategy.

Restorative justice recognizes the stark racial, ethnic, and other disparities that are a feature of our current, primarily punitive approach to crime prevention, and favors policies and practices that address these disparities by building supportive institutions and communities for both offenders and survivors. Restorative justice also recognizes the cumulative trauma of our nation's unparalleled high levels of incarceration and its impact on the children and families of incarcerated people. This includes but is not limited to the loss of household income from an incarcerated family member and disruption of family and community life.

Moreover, a past criminal conviction often allows legal forms of discrimination against former offenders, limiting their access to jobs, education, housing, transportation, and more. This reinforces forms of social exclusion that likely contributed to an individual's criminal behavior in the first place, encouraging recidivism and preventing them from reaching their potential.

Restorative justice typically involves an inclusive and cooperative process that meaningfully engages all stakeholders, but prioritizes the voices of those most affected by crime in developing solutions. This represents a fundamental shift in the role of government in addressing crime. It requires that all government agencies, even those that lack policing or judicial authority, reevaluate hiring and other practices that punish former offenders. It requires government agencies to reevaluate the resources and

supportive programs that it provides for those harmed by crime. Agencies must also carefully consider the ways their policies, such as park curfews and other conduct restrictions, may contribute to criminalization and incarceration rates.

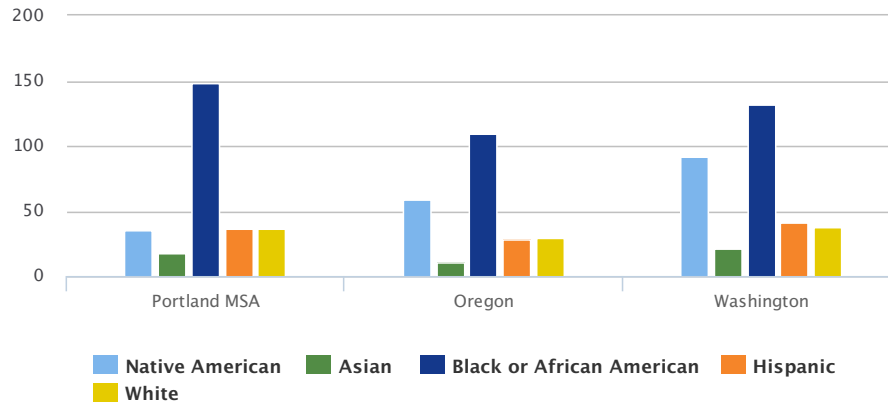
In Oregon, policies and practices that do not fully consider the racial, ethnic, and other disparities that are a feature of our punitive crime prevention efforts reinforce other forms of marginalization that communities of color and low-income communities experience.

For example, Black people in our state are six times more likely than whites to be incarcerated, and make up nearly ten percent of the state's adult inmates, despite comprising only two percent of the state's population. Policies that exclude former offenders from job opportunities, housing, and other services thus entrench the significant social, economic, and political disparities that Black Oregonians face. Likewise, Latino youth charged with an offense that includes mandatory minimum sentencing – known locally as Measure 11 offenses – are far more likely than white to be convicted of that offense.

The rapid increase of the inmate population in Oregon contributes to a situation in which resources are diverted from education and other essential services to fund law enforcement efforts. Indeed, the cost of incarcerating a person for one year is approximately three times as much as it would be to pay for a year of higher education. And while Metro does not have any direct authority over criminal enforcement or outcomes, better coordination of regional crime statistics and tracking outcomes by race, income, gender, age, and other categories would represent a significant step towards equity in our region. Standardizing regional crime data and reporting standards would make comparisons more meaningful, and aid local jurisdictions with police power and judicial authority to more fully understand the impact of their policies.

Rate of juvenile criminal referrals per 1,000 juveniles age 10–17, by race (alone) and Hispanic origin, Portland MSA, 2012

Source: Oregon Youth Authority; Washington Office of Financial Management; US Department of Justice



Source: Greater Portland Pulse

Metro Authority and Influence Over Restorative Justice

Metro has little direct influence over policing and sentencing, but many of its policies and programs have potentially significant impacts on restorative justice. Metro is a major employer in the region and has authority to “ban the box” asking job applicants about past felony convictions, setting an example to other public and private organizations. Just as significantly, Metro has the authority to expand restorative justice programs that provide training and hire individuals with a criminal record. The Expo Center already operates such a program. Metro also has the ability to innovate supportive programs for people harmed by crime. Finally, Metro has an opportunity to influence the crime prevention and enforcement efforts of municipal partners by better coordinating the collection of key crime statistics in our region.

One of the greatest long-term threats to equity in our region is the disproportionate number of youth of color who are targeted by the police (see graph at left). Crime prevention activities that disproportionately target youth of color impose significant barriers to opportunity and future achievement for these youth at a critical time in their life. Such activities also impact their families and communities, in the form of lost income, lost educational opportunities (including eligibility for federal student loans), greater difficulty finding a job after being released from incarceration, and more.

Restorative Justice and Metro’s Desired Outcomes

Restorative justice is critical to achieving all of Metro’s desired outcomes, though often in subtle ways not immediately apparent to decision makers. To achieve **Economic Prosperity**, our region must recognize patterns of policing and sentencing, and the economic barriers created by restriction on the hiring of former inmates. Past mistakes should not, but often do, prevent a person from re-entering the work force.

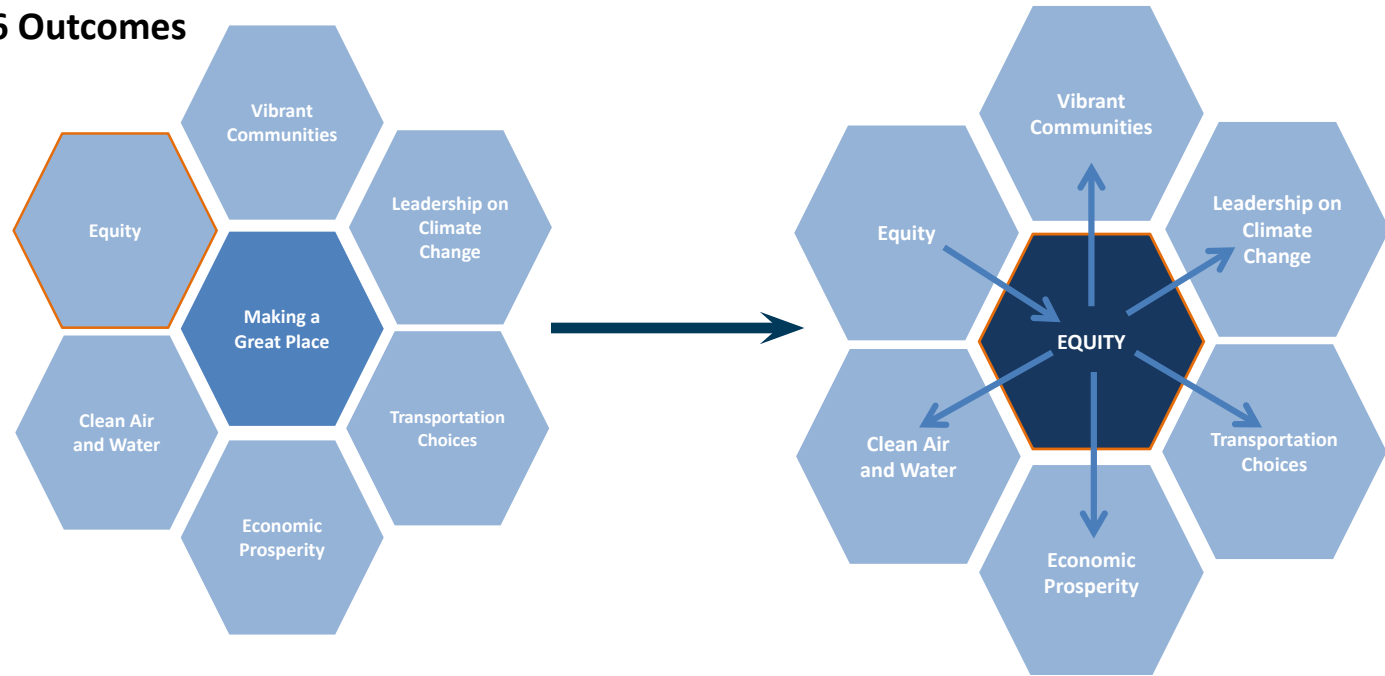
The perpetual exclusion of former inmates from public and civic life is a threat to truly **Vibrant Communities**, as it contributes to increased crime and lower quality of life.

Frequently, criminal convictions also result in restrictions on a person’s ability to drive, making alternative **Safe and Reliable Transportation** options essential to reintegrating offenders.

New research into the effects of environmental pollution and stress has also begun to expose the causal connections between crime and **Clean Air and Water**.

And **Leadership on Climate Change** must include recognition that our current system of mass incarceration drains resources from other local and regional services, and the exclusion of former offenders from social and civic life means their experiences and perspectives are not meaningfully included in regional conversations about climate strategies and resilient communities.

Metro's 6 Outcomes



CONCLUSION AND SUMMARY OF RECOMMENDATIONS

The intended audience for this report is the Senior Leadership Team of Metro, the Diversity, Equity, and Inclusion Program, the Metro Council, the Equity Strategy Advisory Group, and the community members/organizations that will assist Metro in its continuing equity efforts. While other groups or individuals might find the framework described in this report interesting or valuable for their own purposes, the development of this framework report is intended to guide Metro toward a more complete understanding of its roles and responsibilities with regard to its impacts on regional equity.

The Equity Baseline Workgroup believes that Metro must use a racial and economic justice-based approach to equity in order to adequately take into account its social, political, environmental, and economic dimensions. Furthermore, Metro must understand that equity and the agency's other five desired outcomes cannot be segregated from one another or discussed in isolation.

Importantly, the equity indicators, defined in this report, recognize the interrelated nature of equity. These indicators are intended to provide Metro with a clear and consistent framework for understanding and measuring equity and recognizing how it is achieved through the practice of justice and intersects with the other desired outcomes.

The 10-indicator framework and the racial and economic justice lens that this report introduces *are not* intended to provide the complete technical analysis that Metro needs to more fully understand its roles and responsibilities for equity in our region. Nor does this report offer substantive policy recommendations that respond to known disparities. Rather, we provide the framework that will guide a structured equity audit of Metro. This, we believe, is the critical next step in Metro's equity baseline process.

The trauma of historical and contemporary abuse, neglect, and exclusion of people of color and others in our region is very real,

and improved community outcomes are ultimately the purpose of Metro's equity work. To do this, Metro must commit to making internal and institutional changes that reduce these disparities, where Metro has the authority and influence to do so, as quickly as possible.

In terms of its own work, the Equity Baseline Workgroup members made clear to Metro staff, early in the process, that an overly simple survey of the region's inequities could not serve the stated objectives of the agency. Such a report would be redundant to the many well respected analyses on regional inequity that already exist. Moreover, a report that is just another description of these known inequities does not provide specific enough guidance directed at Metro's own initiatives. We believe that a shared understanding of what equity is and requires, and a durable approach to assessing equity that is specific to Metro's roles and responsibilities in the region provide the necessary focus to subsequent efforts and improves the likelihood of successful strategies.

A Community-led Audit of All 10 Equity Indicators at Metro

This report makes clear that marginalized communities suffer the most from regional inequity because of their cumulative exclusion from social, political, and economic capital. Metro must acknowledge that the disparities, outlined in each of the ten indicators in this report, greatly influence the health, wealth, and happiness of individuals and communities within our region.

In so doing, it acknowledges the importance of a continued collaboration with community members and organizations that are most impacted by Metro's equity initiatives to assist Metro in its examination of its roles and responsibilities for equity in our region.

The creation and careful definition of the ten equity indicators highlight the complex, integrated, and overlapping policies and

practices that disparately impact community members. These indicators should thus drive community-led interdepartmental discussions related to Metro's equity effort, both internally in terms of employment and contracting decisions, and externally in terms of the programs and services it provides.

This structured audit of Metro's programs and policies will identify areas where Metro can make an immediate impact on agency and regional inequities, as well as areas where Metro can lead or facilitate longer-term strategies that include, but are not limited to, better data collection and regional coordination.

The goals and opportunities identified by this community-led process should help Metro create equity priorities, based on a shared understanding of Metro's authority and influence over each equity indicator (outlined in this report), and the urgency of community identified needs.

Similarly, Metro should collaborate with community organizations to establish agency-specific performance and accountability measures for each equity indicator. By establishing annual performance and accountability measures, Metro will be able to more effectively assess and communicate how the agency is addressing disparities in our region and compare progress to an agency-specific baseline.

Additional Indicator & Data Recommendations

One of the key findings of this report is that equity-related data in our region are frequently incomplete or nonexistent. Without improved data, Metro will be unable to effectively measure or respond to regional disparities. Thus, Metro should work with local jurisdictions and community organizations to better understand

the data deficiencies and to collaborate on collecting new data. However, the need to improve regional data must not be a barrier to developing strategies that address known disparities, but improved data is one of the central roles that Metro can play in our region.

In addition, Metro should continue to invest in vital, local data providers and analyses such as the Regional Equity Atlas, Greater Portland Pulse, *Unsettling Profiles*, and the *State of Black Oregon*. Finally, it should develop a thoughtful strategy for internal data collection and analysis based on this framework report.

APPENDIX A

*Application of Justice Lens & Potential Equity Data
for Subsequent Equity Baseline Work*

APPLICATION OF JUSTICE LENS & POTENTIAL EQUITY DATA FOR SUBSEQUENT EQUITY BASELINE WORK

What follows is a brief discussion of how to apply a justice lens to data collection and analysis, initial suggestions for the data that Metro should use to establish indicators of regional equity, and known limits to the suggested data that need to be addressed in the next phase of Metro's Equity Baseline process.

How to Apply the Justice Lens to Regional Data and Indicators

In order for Metro to apply a racial and economic justice lens to its data collection and analysis of regional disparities, it must establish census tract-level thresholds for each of the justice communities described above. Census tracts that contain populations at or above the regional median for each population are the areas of greatest concern when Metro is analyzing an issue that is spatial in nature. When the issue is not spatial in nature, all members of a particular community or shared identity, however dispersed, are the focus of analysis.

Special attention should be paid when assessing disparities between our region's communities of color and the non-Hispanic white community. All people of color should be compared in aggregate to the non-Hispanic white population to show disparities between these two groups. However, it is equally important to assess communities of color individually (Black v. Asian/Pacific Islander v. Hispanic/Latino, and so on) to better understand disparities within and between communities of color. For example, in every common measurement of regional inequity, people of color suffer from greater disparities than non-Hispanic white people. But it is also true that Black people specifically suffer the greatest disparities of all in our region. To properly show racial and ethnic disparities, the comparison population is always the non-Hispanic white population, regardless of whether communities of color are being assessed in aggregate or individually. And racial data should also be further disaggregated by ethnicity/language and national origin identification to the greatest extent possible.

When setting thresholds for what constitutes a "low-income" household or individual, Metro must avoid the use of Federal Poverty Level (FPL) statistics whenever possible. The many problems associated with using the FPL as a measure of sufficient local income are well known to anti-poverty advocates and researchers. FPL is calculated primarily based on the cost of food because of its historical development alongside federal food assistance programs, and it fails to consider local variability in prices. This leads to a definition of poverty (and other low-income classifications) based on a household cost (food) that is relatively small compared to housing, transportation, health care, education, and other costs; and a definition of poverty that is the same for all 48 contiguous states, regardless of local cost of living.

Because so much of regional economic data are based on FPL (usually in the form of a percentage above FPL defining low-income), Metro is limited in its ability to understand the conditions and needs of the working poor in our region and should develop a more local standard for this definition. Metro currently defines a "low-income" person as someone living at or below 185% of FPL relative to household size. However, this definition fails to consider thousands of households that qualify for Federal Section-8 Low-income Housing Vouchers, which is based on local medium family/household income (MFI) rather than FPL.

Recognizing the limits of FPL as opposed to more local standards like MFI, while also recognizing that for most of Metro's purposes MFI data are not available, it is considering increasing the definition of low-income to 200% FPL, as this is closer to standards used in the low-income housing context. However, as the graph above makes clear, there is no easy compromise between FPL standards and more meaningful local standards. Metro should use 60% MFI as its definition of low-income whenever possible, and use 200% FPL when this more local standard is not available. Additionally, Metro should explore alternatives to FPL such as a self-sufficiency index, free or reduced-price lunch

| Household Size | Section 8 Low-income Housing | | | Federal Poverty Level | | | |
|----------------|------------------------------|---------|---------|-----------------------|--------|--------|--------|
| | 50% MFI | 60% MFI | 65% MFI | 150% | 175% | 185% | 200% |
| 1 | 24,300 | 29,160 | 31,590 | 17,505 | 20,423 | 21,590 | 23,340 |
| 2 | 27,800 | 33,360 | 36,140 | 23,595 | 27,528 | 29,101 | 31,460 |
| 3 | 31,250 | 37,500 | 40,625 | 29,685 | 34,633 | 36,612 | 39,580 |
| 4 | 34,700 | 41,640 | 45,110 | 35,775 | 41,738 | 44,123 | 47,700 |
| 5 | 37,500 | 45,000 | 48,750 | 41,865 | 48,843 | 51,634 | 55,820 |
| 6 | 40,300 | 48,360 | 52,390 | 47,955 | 55,948 | 59,145 | 63,940 |

Average Household Size = 2.3

students, or triangulation of all income data. This conversation and recommendations are expected to be more robust in the subsequent technical analysis report that follows this baseline framework report.

Once the definitions of justice lens communities has been established, and once geographic thresholds have been set based on median population levels in census tracts, Metro should also identify census tracts that are a standard deviation below regional medians. These census tracts that are very near the median often signal communities in transition, either because a particular population is being displaced or being increased. These areas should be prioritized for community engagement strategies and further research to understand the nature of their transition.

Whenever possible (and appropriate based on the nature of the analysis) all ten of the indicators defined in this report, as well as the constituent data in each indicator, should be assessed at the tract level or smaller. Because demographic data are often less accurate at this very small geographic scale, this requires a great deal of technical work to recognize and represent margin of error and best practices for uncertainty. Census data should be used as a benchmark for data, but it is only available every ten years and the elimination of the long form census severely limits the future of census data for detailed demographic analysis. However, the key to equity data analysis and collection is to conduct it as close to the neighborhood level as possible.

Indicators and their constituent data points should also be disaggregated by as many justice lens communities as possible to

allow both mapped and tabular comparisons of disparities across communities/identities. The level of disaggregation that is possible often determines the quality and usefulness of an equity analysis, and it is strongly recommended that Metro collect and prioritize data that can be disaggregated as much as possible. For example, language data from schools and other ethnicity data can help show significant disparities between different groups of people that have been classified as a single racial category. This is particularly true in the Asian/Pacific Islander community, where significant differences exist between the Japanese, Mandarin, Vietnamese, and Korean speaking communities.

The importance of disaggregating data as much as possible cannot be overemphasized. But when data are disaggregated it is also critical to remember that the comparison population for analyses purposes is *never* the regional population as a whole, but the “remainder” of regional population (the population excluding the community being assessed). For example, if the community being assessed is the low-income community, individuals living on incomes below the defined threshold would be compared to those living on incomes above the threshold, not simply compared to the regional median.

Potential Measures of Regional Equity

The Equity Baseline Workgroup has identified the following data points/issues for further consideration and refinement in constructing Metro’s equity indicators. Not all of these measurements will be included in the final baseline indicators, and many will be significantly modified, but they are listed here for reference and to guide next steps:

Housing Equity

- **The location of publicly subsidized affordable housing:** Current data do not include non-regulated (i.e. private market) housing units that are affordable to low-income

residents. These non-regulated housing units constitute a significant percentage of affordable housing stock in our region. The data also do not include the locations of Section 8 voucher holders who receive publicly subsidized vouchers that keep their housing affordable and can be used for private units.

- **Housing cost burden:** 30% or more of income on housing and utilities: This data are from the American Community Survey and it includes mortgage or rent payments, condominium membership and other fees, real estate taxes, premiums for homeowner's insurance, and utilities. Because of sample size issues, the margin of error tends to be quite high when disaggregating this dataset by race, ethnicity, and other demographic groups. This limits the data's ability to be disaggregated by individual communities and by close levels of geographic analysis. The margins of error should be consulted before using these data for any analyses.
- **Home Mortgage Disclosure Act (HMDA) loan applications and denials:** This data do not capture information on people who may not have applied for a loan to begin with because of economic or other barriers or the perception that they would be denied. The loan denial information also does not provide adequate information on the reasons for the loan denial.
- **High interest loans:** It is uncertain where these data would originate. Nationally, some groups have used the HMDA Summary Table B to determine, at a glance, the overall level of an institution's loan pricing, detailed by loan type. However, research must be done to determine the appropriateness and the limitations of this dataset.
- **Americans with Disabilities Act (ADA) compliant homes:** Fair housing law requires that any residence built or substantially modified after 1991 must be ADA "handicap

accessible." Therefore, these data (if available) will only be reliable for homes built or substantially modified after 1991.

- **Density of homeowners/renters:** No issues of concern.
- **Proximity to frequent public transportation:** While these data measure the approximate distance of housing to transit stops, they do not measure transit connectivity -- i.e. how easy it is to get from one place to another via the transit lines that are available at a given transit stop. Connectivity is a key component of transit access, but mapping connectivity of transit lines in a comprehensive way was not possible within the scope of this project.
- **Proximity to social services:** To identify the location of social services, the data must rely on North American Industry Classification System (NAICS) codes. NAICS is the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The codes are self-reported and thus represent what the business deems its primary service. These data sources do not capture the full range of social services available across the region. They merely represent the types of institutions for which comprehensive data are available. Mapping all the social services in every neighborhood across the region would require primary data collection. Lastly, geographic proximity to social services does not necessarily translate into access. These data do not provide any information on other key components of access such as cultural appropriateness or hours of operation. Such data are not available to the public in a comprehensive way.
- **A "habitability" index:** This index must be produced before analysis of data concerns can be undertaken. A habitability index is intended to identify the quality (as opposed to

quantity) of affordable housing in our region. It would include lead and mold exposure, and other concerns that compromise housing quality. Available information is extremely limited, especially for affordable housing units that are not publically subsidized.

- The location/quality of “accidental or incidental” affordable housing (distinct from intentional/publicly-subsidized housing): Uncertain if this data are available.

Transportation Equity

- **Public transit reliability: Percent on-time**
 - Reliability of trips is difficult to measure because percent on-time does not address connectivity/transfer concerns — i.e. how easy it is to get from one place to another via the transit lines that are available at a given transit stop at a given time.
- **Public transit service span: Days/time**
 - The time that transit service starts/stops throughout the day/week varies widely from line to line, and the effect on connectivity/transfer concerns (see above) is difficult to capture.
- **Public transit frequency**
 - The frequency of transit service varies widely from line to line, and throughout the day, that this effect on connectivity/transfer concerns (see above) is difficult to capture.
- **Households within ¼ mile of frequent public transit service**
 - While these data measure the frequency of trips through transit stops, they do not measure connectivity.
- **Schools within ¼ mile of frequent public transit service**
 - While these data could measure the frequency of trips through transit stops near schools, they would not

measure connectivity – i.e., how easy it is for students/others to get to the transit line that serve the school.

- **Jobs within ¼ mile of frequent public transit service**
 - Defining and identifying “jobs” is crucial to this dataset. Are we looking at all jobs or jobs with living wage pay? Determining average pay by industry can be done, but it is a bit tricky. It would require additional analysis on top of the identification of jobs location.
- **Location of curbcuts**
 - Uncertain if these data are available for entire region. The city of Portland may be the only jurisdiction that has these data. If available, additional questions arise regarding how a “curbcut” is defined and measured as well as the date the data were updated. In terms of definition and measurement, for example, a curbcut that does not meet ADA regulations might not meet the standards that define an accessible curbcut.
- **Sidewalk network/connectivity**
 - The presence of sidewalks in only one component of walkability. The data layers do not provide any detail about the condition of the sidewalk or whether there are any impediments (such as low hanging tree branches or lack of curbcuts). They also do not provide any indication of traffic volume, the presence of crosswalks, and other factors that facilitate pedestrian access.

Sidewalk data are often not completely up to date because the information changes on an ongoing basis. The accuracy of sidewalk data varies. The data for the city of Portland are generally quite accurate, but is less accurate for areas outside of Portland and is non-existent for many rural areas. Care should be taken in interpreting sidewalk coverage in outlying areas as accuracy is severely diminished.

- **Bike network/connectivity**
 - When assessing bicycle networks, there needs to be a shared definition of what constitutes different levels of connectivity. Without such definition, an assessment will be extremely difficult to complete.
- **Location of unpaved roads**
 - Uncertain if these data are available for jurisdictions outside of Portland.
- **Transportation cost as a percent of income**
 - It appears that “transportation costs as a percent of income” would come from the Consumer Expenditure Survey: <http://www.bls.gov/cex/home.htm>. The surveys are sample surveys and are subject to two types of errors, nonsampling and sampling. Nonsampling errors can be attributed to many sources, such as differences in the interpretation of questions, inability or unwillingness of the respondent to provide correct information, mistakes in recording or coding the data obtained, and other errors of collection, response, processing, coverage, and estimation for missing data. The full extent of nonsampling error is unknown. Sampling errors occur because the survey data are collected from a sample and not from the entire population. Tables with standard errors and other reliability statistics are available by request on the Consumer Expenditure Survey website; these tables are classified by the same demographic characteristics found in the 10 “standard” tables published for the survey, except for the classification by region. Caution should be used in interpreting the expenditure data, especially when relating averages to individual circumstances. The data shown in the published tables are averages for demographic groups of consumer units. Expenditures by individual consumer units may differ from the average even if the characteristics of the group are similar to those

of the individual consumer unit. Income, family size, age of family members, geographic location, and individual tastes and preferences all influence expenditures.

- **Pedestrian-vehicle crashes**
 - Oregon’s Department of Motor Vehicles (DMV) has set threshold limits for crash reporting based on estimated property damage and personal injury. Oregon law currently requires that any crash on a public roadway resulting in a fatality, bodily injury or damage to one person’s property in excess of \$1,000 must be reported to the DMV. Submittal of these crash reports are the responsibility of the individual, which likely results in undercounting. Approximately 33% of all reported crashes are also investigated by a police officer, who also files a report to the DMV.
With regard to fatalities, detail is not provided on who was killed (e.g. the pedestrian, bicyclist or driver) or how many fatalities occurred.
- **Vehicle-vehicle crashes**
 - See a Pedestrian-vehicle crashes above.

Cultural Equity

- **Cultural institutions and cultural preservation programs**
- **Access to cultural institutions by sidewalk**
- **Access to cultural institutions by public transit**
- **Public investment in cultural institutions and cultural preservation programs**
- **Location of culturally appropriate food sources**
 - Data on cultural institutions are limited. In particular, they exclude informal culture organizations, those

without a physical location, and the many less institutionalized ways in which communities experience arts, culture, heritage, and creative expression.

- **Explicitly arts-related organizations** (e.g., museums, performing arts centers, artists' studios)
- **Short-term and episodic cultural venues and events** such as festivals, parades, or arts and craft markets
- **Parks and libraries offering or hosting cultural programs**
- **Churches offering or hosting cultural programs**
- **Ethnic associations or ethnic-specific business establishments** offering or hosting cultural programs
- **Formal and informal cultural districts, and neighborhoods**
- **Web-based opportunities for cultural engagement**
- **Child involvement in arts education in K–12 and afterschool arts programs**

Environmental Equity

- **Location of brownfields**
 - The Environmental Protection Agency's Toxic Release Inventory (TRI) provides data on the locations of businesses and other facilities that have been cited for the disposal or other releases of over 650 toxic chemicals. However, an analysis of the TRI data for the Equity Atlas project determined that the TRI data on by themselves do not provide the level of detail necessary for mapping exposure to environmental toxins in a meaningful way. Data would need to be collected from jurisdictional or county environmental bureaus from across the region.

Also, there will need to be an assessment regarding how each jurisdiction/county bureau defines "brownfield" to ensure measurement consistency.

- **Public investment in brownfield amelioration**
- **Location of superfund sites**
 - See "Location of brownfields" above regarding TRI data. Data would need to be collected from jurisdictional or county environmental bureaus from across the region. Also, there will need to be an assessment regarding how each jurisdiction/county bureau defines "superfund sites" to ensure measurement consistency.
- **Solid waste treatment/storage facilities**
- **Air quality monitoring**
 - Oregon's Department of Environmental Quality collects monitoring data to assess which pollutants currently exceed benchmarks near the existing air quality monitoring locations. However, monitoring locations are limited.
- **Toxic/dangerous freight transport**
 - This dataset may be limited by the way "dangerous" is defined.
- **Public investment in lead abatement**
- **Public investment in environmental education**
- **Location of parks and natural areas/greenspace**
 - Designation of a park, natural area, or greenspace is by general classification only. The mapped layers do not provide information about the type or condition of the facilities or levels of public use.

- **Location of schools**
 - We are assuming that the inclusion of location of schools is to look at proximity because schools have greenspace that is generally open to the public. The limitation is that some schools do not have greenspace (i.e. Montessori schools and some schools located in dense neighborhoods).
- **Access to cultural institutions, parks, natural space by sidewalk**
 - A new network analysis would need to be completed and it would require the use of data on park entrance locations to ensure correct measurement. Equity Atlas limitation: A map showing this dataset could be completed using a data composite of sidewalk density and proximity to parks and natural space, available in the Equity Atlas. Such a composite would create a map that would be misleading because it would not take into account park entrances and would still give moderate scores to areas with very close park proximity and very poor sidewalk coverage.

Data on cultural institutions are limited. In particular, they exclude informal culture organizations, those without a physical location, and the many less institutionalized ways in which communities experience arts, culture, heritage, and creative expression.
- **Access to cultural institutions, parks, natural space by public transit**
 - Data on cultural institutions are limited. In particular, it excludes informal culture organizations, those without a physical location, and the many less institutionalized ways in which communities experience arts, culture, heritage, and creative expression.
- **Location of trails and bike lanes**
 - Unsure what the combination of these datasets are trying to display. Is this a dataset that looks at recreation?
- **Tree canopy**
- **Lighting of same**
 - The park and natural space layers do not provide information about the condition or amenities of the facilities. A comprehensive inventory of these attributes would require primary data collection. Additionally, primary data collection may not address issues related to whether lighting is maintained.
- **Amenities of same**
 - See lighting above.
- **Availability of flat/flexible space**
 - The park and natural space layers do not provide information about the amenities or elevation of the facilities. A comprehensive inventory of these attributes would require primary data collection.
- **Investment dollars per square mile**
- **Community needs/satisfaction**
 - Uncertain if this data are available. If so, they would require a large sample size to reduce significant margins of error.

Health Equity

- **Asthma rate**
 - Equity Atlas data limitation: Data are reported only for those patients that were continuously enrolled in a health plan that participates in the Oregon Health Care Quality Corporation's measurement and reporting initiative or Medicaid fee-for-service during the measurement year, with no more than one gap of up to 45 days. Data do not include uninsured patients, patients who pay for their own health care services, Medicare fee-for-service patients, or patients served by a plan or Medicaid provider that does not supply data to Quality Corp. The

data, therefore, do not represent all persons living within a census tract or neighborhood.

Data on rates of asthma, diabetes and cardiovascular disease were geocoded by patient addresses. However, in order to maintain confidentiality, the data were aggregated into either census tracts or neighborhoods. If the number of records failed to meet a minimum sample size threshold the data were not reported (indicated by a 999 in the attribute table). The sample size threshold that was used was based on the recommendations outlined by the Center for Disease Control in their National Center for Health Statistics Staff Manual on Confidentiality. Based on this threshold, data from geographies where the numerator was less than five people, or the difference between the denominator and numerator was less than five people, were suppressed. As an example, if a geography had 50 patients in the denominator then it was reportable so long as the numerator was between five and 45. Additionally a denominator threshold of 25 was applied to ensure robust reported rates.

Some patient records did not have complete patient street addresses. If the street address could not be accurately located within the aggregated geography, those patient records were not mapped.

- **Diabetes rate**
 - See Asthma rate limitations above.
- **Cardiovascular disease rate**
 - See Asthma rate limitations above.
- **Cancer rate**
 - The sample sizes for these measures may not sufficiently large to enable them to be mapped at a level below the US Census Metropolitan Statistical Area (MSA). Mortality attributable to cancer, on the other hand, may have

sufficiently large sample size to measure at a level closer than MSA.

- **Infant mortality/morbidity/low birth-weight rate**
 - The sample sizes for these measures may not sufficiently large to enable them to be mapped at the census tract level.
- **Health services provided in culturally appropriate way**
 - These data do not exist and would be extremely difficult to collect. It will also be limited by the way “culturally appropriate” is defined.
- **Mental health and/or addiction**
 - Uncertain if these data exist. If so, the sample sizes for these measures may not sufficiently large to enable them to be mapped at the census tract level.

Note that obesity rate is an often-utilized public health measurement, but has been intentionally omitted by the equity baseline workgroup. Despite its growing profile in conversations about public health, obesity is a controversial measurement because of the ways in which measurements fail to consider natural variation in body-types and the effect of cultural practices/norms. Indeed, many people who are classified as obese by medical professionals are relatively healthy, and a focus on weight often does little more than shame people who don't have “ideal” bodies. Moreover, the health concerns that obesity rates are used as a proxy for – namely asthma, diabetes, cardiovascular disease, and cancer – are already included in this indicator.

Economic Equity

The workgroup has identified twelve datasets for further consideration and refinement in constructing Metro's economic prosperity indicator. These measurements include:

- **Current median household income**
 - The ACS uses a sample survey. The margin of error can be high in tracts with a low sample population. The margin of error and coefficient of variation are provided in the data should be consulted before any analysis.
- **Historical median household income**
 - See "Current median household income" above.
- **Self-sufficiency index**
- **Transportation to jobs**
- **Transportation to schools**
- **Workforce training sites and employment-related services**
 - This is an incomplete list, compiled through readily available sources. It shows locations of training or service sites but does not indicate how many persons the site has serviced or the extent to which the site has met local needs for workforce training or employment-related services.
- **Housing and transportation cost burden**
 - Because the data for this indicator are based on complex economic models (using American Community Survey and Bureau of Labor Statistics sample data), it is not possible to determine the margins of error for the data.
- **Free or reduced-price lunch students**

- **High interest rate loans**

- It is uncertain where these data would originate. Nationally, some groups have used the HMDA Summary Table B to determine, at a glance, the overall level of an institution's loan pricing, detailed by loan type. However, research must be done to determine the appropriateness and the limitations of this dataset.

- **Access to home loans** (Home Mortgage Disclosure Act data)

- These data do not capture information on people who may not have applied for a loan to begin with because of economic or other barriers or the perception that they would be denied. The loan denial information also does not provide adequate information on the reasons for the loan denial.

- **Unemployment rate**

- The ACS uses a sample survey. The margin of error can be high in tracts with a low sample population. The margin of error and coefficient of variation provided in the data should be consulted before any analysis. The closest level of analysis for this data are county level.

- **Access to child care**

- The data do not capture affordability and waitlists of child care facilities.

Food Equity

- **Proximity to food stores and farmers' markets accepting SNAP & WIC**
- **Metro investment in food education programs**
- **Schools providing food education**
- **Free and reduced price lunch data**

- **Affordability of food** (market based survey)
 - Uncertain if these data exist. If they do, these data would be extremely difficult to map and analyze due to the multiple variables included in a market basket survey. Additionally, due to the detailed nature of market basket surveys, data are extremely difficult to collect and may lead to a limited sample size of stores. This sample could be misleading if not large enough.
- **Culturally specific food stores**
 - Unsure if these data exist. If so, these data may be limited by the way “culturally specific food stores” is defined and whether this information is self identified by the store itself. Self identification creates limitations because a store may consider itself a “culturally specific food store” however it may not be viewed that way by community members.

This is an indicator where further data collection is strongly needed for the region and presents the opportunity to partner with other organizations and companies that collect relevant food related data for other purposes.
- **Other data** that could be analyzed include economic data captured from food banks serving our region. Data compiled from local food banks would provide insight into the profile of food bank customers. It could also provide data on the use of emergency food boxes per distribution site, which would help identify areas of highest need and when that need spikes. Food banks are often the last resource before hunger and could be a wealth of data on impacted communities.

Another potential source of extremely valuable data would be in developing stronger relationships with major food retailers, particularly full service grocery stores. For example, data on the availability of culturally specific food are extremely difficult to find, but working with retailers such as Winco or Fred Meyer, researchers may be able to collect

information on both what cultural food products are available and how much is sold. Data from these retailers could also be collected on SNAP reimbursements to help paint a more accurate picture of the food environment. Indeed this may be an opportunity to track migration patterns to some degree, by measuring growth and decline in sales of certain goods in various grocers.

From food bank and retail data, researchers could also then select priority regions to do Community Food Security Assessments. Much like a health impact assessment, these studies are opportunities to learn more about food access issues in particular geographic locations. These studies would engage the community on food access issues and provide potential solutions.

Education Equity

- **Adult educational attainment**
 - Because of sample size issues, the margin of error tends to be quite high when disaggregating ACS data. Consequently, the Educational Attainment indicators are mapped at the Public Use Microdata Areas (PUMA) level in the Equity Atlas -- a relatively coarse geographic unit but one where the margin of errors are at an acceptable level. The map can be used to discern general patterns only. Nevertheless, for future data analysis, it might be possible to disaggregate the data to a geographic level closer than PUMA. To determine this, the ACS information on the margin of error should be consulted to determine correct analysis level.
- **Dropout rates**
 - Dropout and completion rates are based on a ratio and the numerator and denominator are extremely difficult to identify. For example, the numerator typically represents dropouts, completers, or graduates. Identifying the students who are graduates is somewhat straightforward—they are the diploma

earners. Identifying the students who fall into the other categories and distinguishing between graduates and other completers are more difficult. Schools continue to struggle with understanding whether a student is considered a “transfer” or a “dropout”. Also, students that repeat grades sometimes are double or even triple counted in cohort measurements. These issues may result in larger margins of error for schools that see higher rates of transfer, grade repeats, and dropouts.

- **Chronic absenteeism**
- **Disparate disciplinary rates**
- **Teacher/administrator demographics and retention/recruitment efforts**
 - If data are available, the categories used for collecting information on race and ethnicity may be similar to the U.S. Census and not capture the wide range of racial and ethnic identities within the population.
- **English as a Second Language programs investment**
- **Access to early childhood education**
 - The data for this indicator only capture proximity to early childhood education centers. It is also important to note that availability of open slots tend to be greater barriers to access than geographic proximity. Unfortunately, comprehensive data are not available in a format that would enable mapping of these factors.
- **Access to Advanced Placement/International Baccalaureate (AP/IB) courses**
 - Current data only show availability of AP/IB courses at each public school. These data are intended to reflect the range of course options available to students. However,

they do not measure student access to these courses. Enrollment data would provide a better indication of student access to these course options, but that data are not available in a comprehensive format across schools.

- **Achievement gaps**
 - The “achievement gap” in education refers to the disparity in academic performance between groups of students. This gap tends to be solely based on standardized exams which have many limitations and biases.
- **Student population stability/displacement**
 - Similar to the dropout rate, public schools have a poor record of tracking reasons for leaving a school. For this reason, the ability to separate between dropout, transfer, and home schooling continue to be problematic for public schools. Therefore, these data may come with high margins of error.
- **Student debt burden**
- **Tax Increment Finance dollars diverted by Urban Renewal Areas**
- **Adult access to child care**
 - The data for this indicator only capture childcare centers that are licensed. As a result, they do not include some private preschools that are not required to be licensed. It is also important to note that affordability and the availability of open slots tend to be greater barriers to childcare access than geographic proximity. Unfortunately, comprehensive data are not available in a format that would enable mapping of these factors.
- **Non-traditional student access to childcare**
 - See “Adult access to child care” above.

Meaningful Engagement and Empowered Communities

- **Voting** (both registration and turnout)
 - Voter registration data do not always match the Census population/age data. It is possible some block groups indicate more registered voters than total population of voting age (although this is rare). This is likely due either to Census undercounting or because persons do not update their voter registration after a move to another precinct. Where errors in counts of registered voters occur, the percentage of eligible voters that voted in the last 3 primaries or general elections may be affected.
- **Demographic breakdown of elected officials, city employees, subcommittees, and advisory committees**
 - If data are available, the categories used for collecting information on race and ethnicity may be similar to the U.S. Census and not capture the wide range of racial and ethnic identities within the population.
- **Metro investment in direct capacity building and technical support**
 - This dataset may be limited by the way “capacity building” and “technical support” are defined.
- **Metro investment in community outreach**
- **Title VI requests/complaints** (particularly with respect to Limited English Proficiency populations)

Restorative Justice

- **Arrests**
- **Terry stops** (profile-stop-and-frisk)
- **Sentencing**

- **Location and population of correctional facilities**
- **Juvenile crime rate**
 - Some agencies might have missing or otherwise unusable address data for five percent of its records, while another may have as much as 25 percent or more missing. Many reasons account for these shortfalls (including blank records and people who are homeless can’t be matched to digital street maps). This may cause an undercount of certain locations.
- **Recidivism rate**
 - See “Juvenile crime rate” above.
- **Supportive policies** (example: Ban the Box)
 - The definition of “supportive” and identification of such policies may be the limiting factor with this dataset.
- **Housing services**
 - The data for this indicator only capture proximity to services. Proximity only provides a limited view on this issue because there are greater barriers to access than geographic proximity.
- **Economic development services**
- **Youth services**
 - See “Housing services” above.
- **Domestic abuse shelters and services**
 - See “Housing services” above.
- **Access to counseling and other support**

- **White collar crimes**
 - There is certainly an undercount with this dataset which means fairly high margins of error which would require this dataset to be analyzed at large geographic levels such as counties or the MSA.
- **Targeted community enforcement areas**
- **Targeted transit center enforcement areas**
- **Targeted drug-free zones**

APPENDIX B

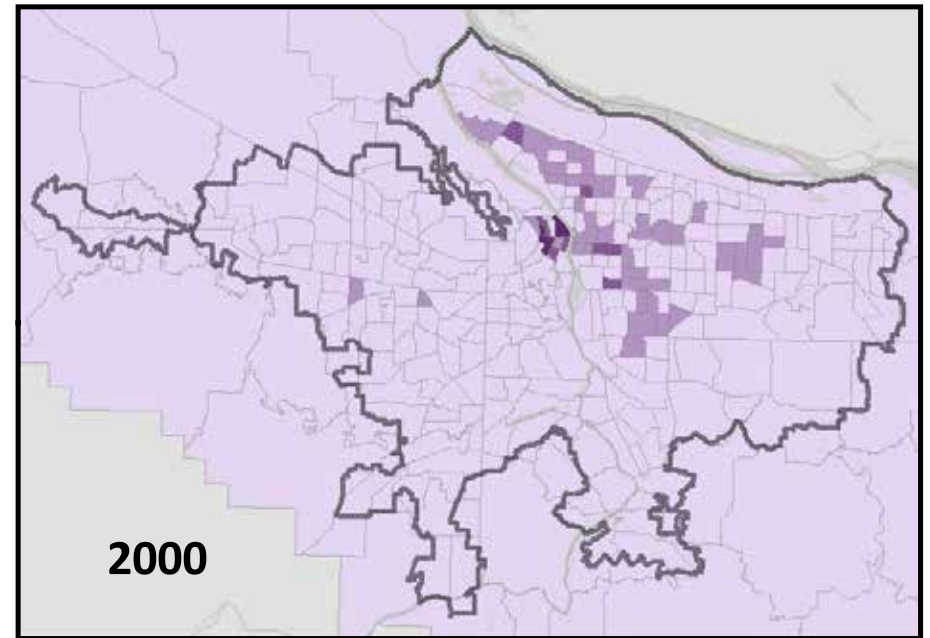
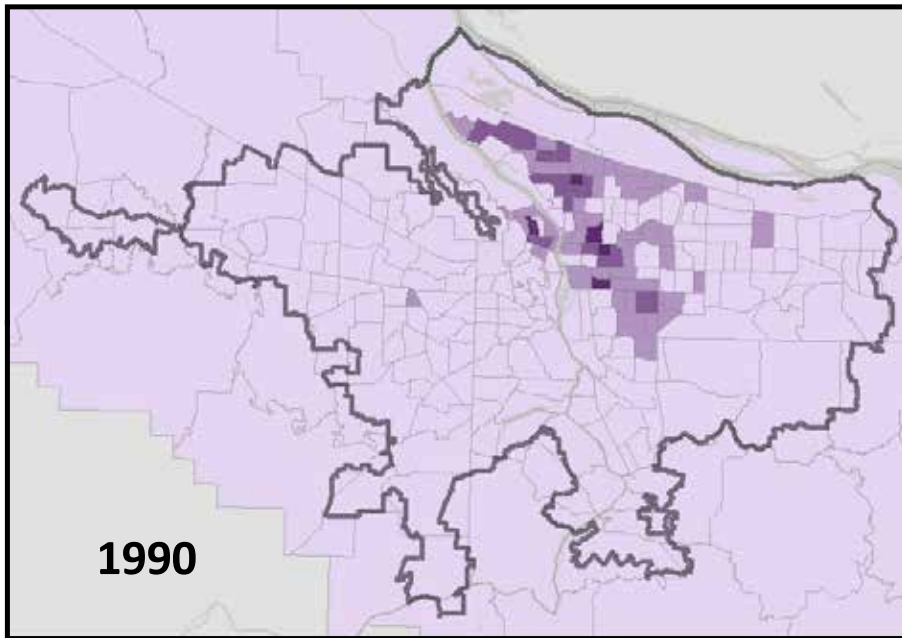
Shifting Geographies of Race, Ethnicity, and Poverty

Note: *Foundational to any regional equity analysis is an examination of the push/pull factors behind **where** people live to understand **why** they live there.*

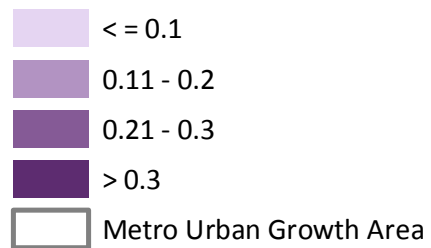
As this report suggests, where people live affects a whole host of outcomes including our sense of well-being, educational opportunities, economic prosperity, and health.

Embedded in the geographies of race, ethnicity, and poverty are historical forces that have played out differently for each of the groups mapped here.

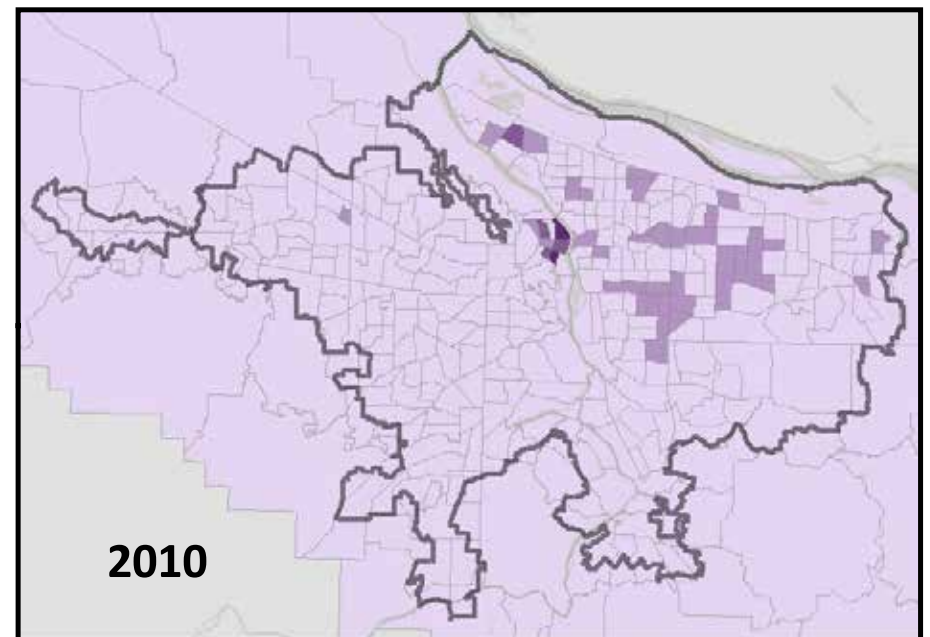
In equity analyses that seek to provide solutions, it isn't enough to know that people have been "pushed." Solutions require deeper understandings of the why's and how's they have and are being "pushed."

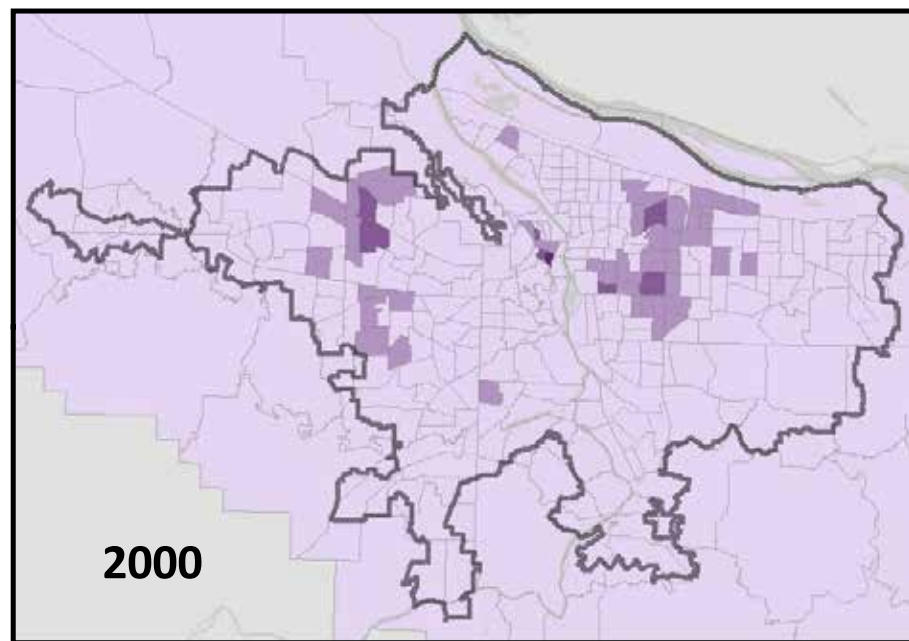
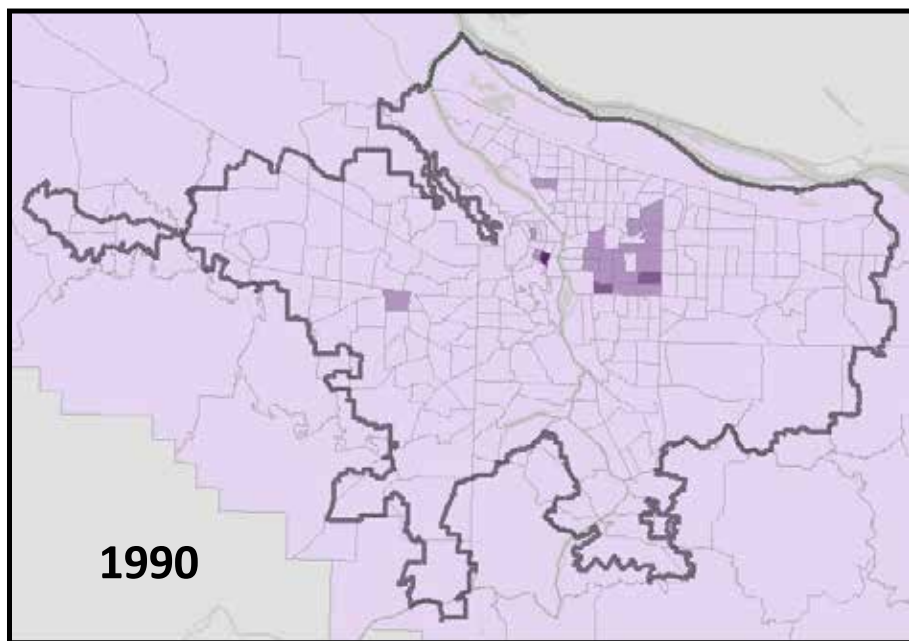


American Indian, Eskimo, Aleut per Acre

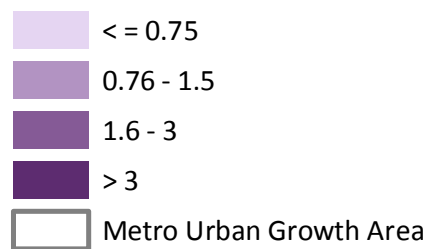


Intermediate Source: PSU Population Center
Primary Source: Census Bureau

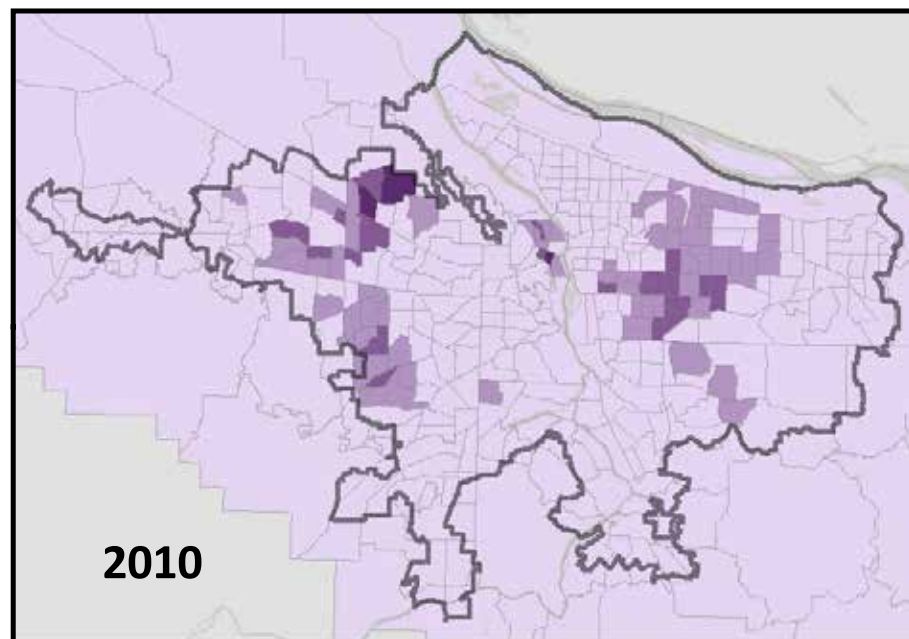


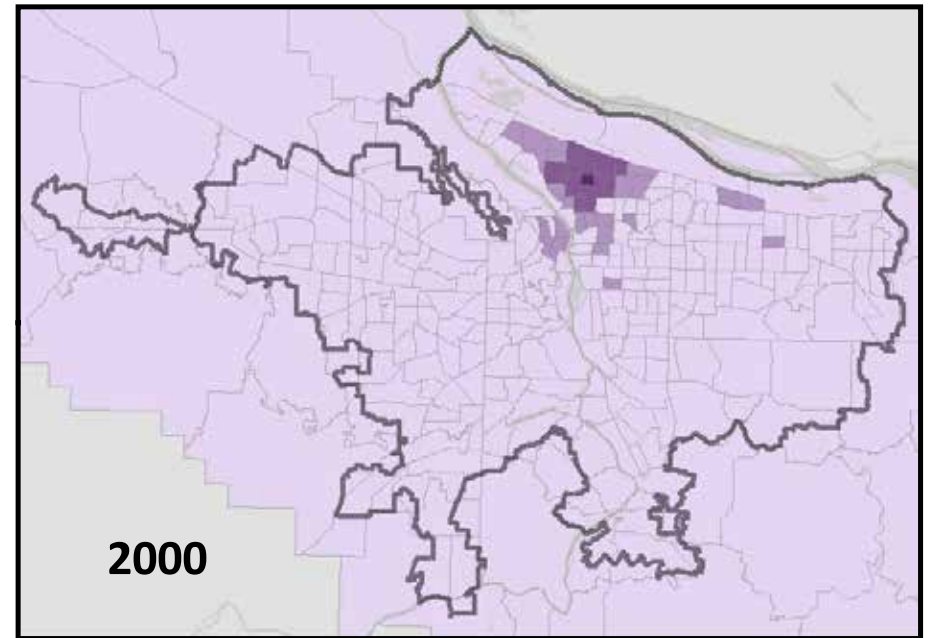
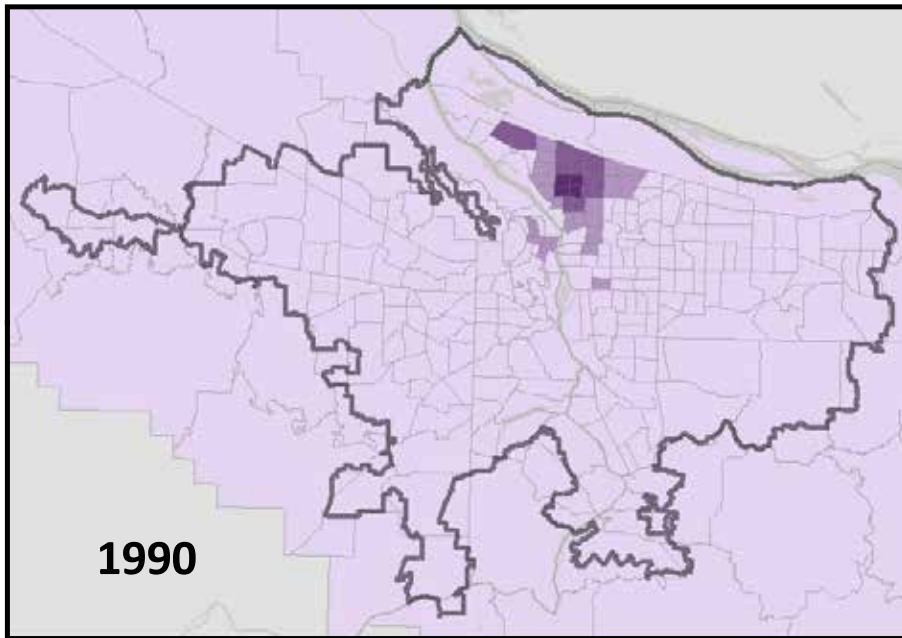


Asian per Acre

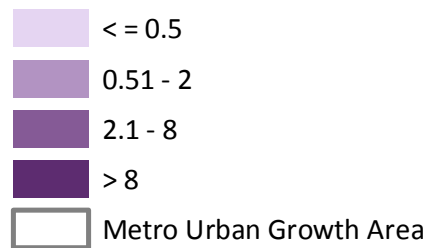


Intermediate Source: PSU Population Center
 Primary Source: Census Bureau

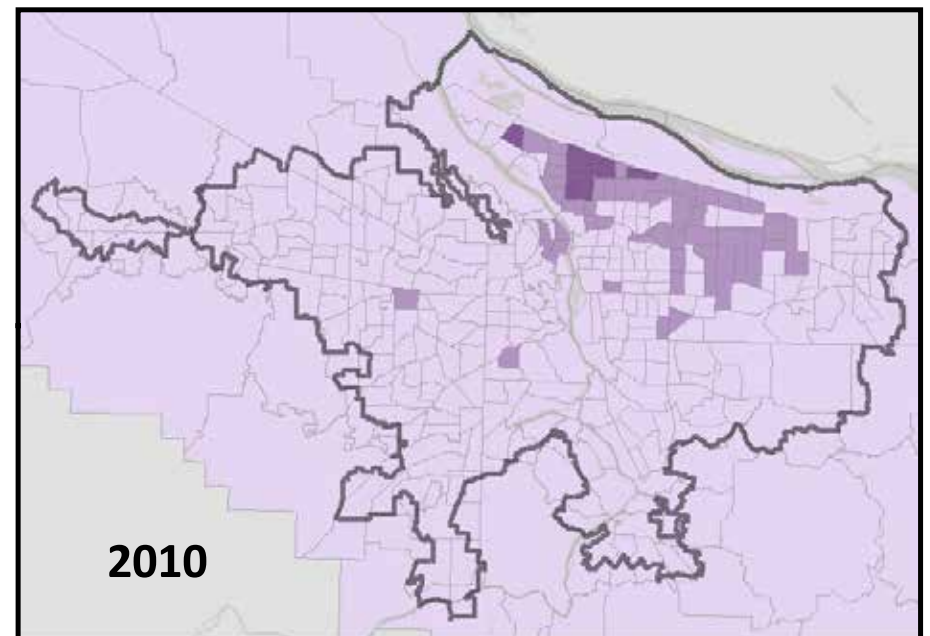


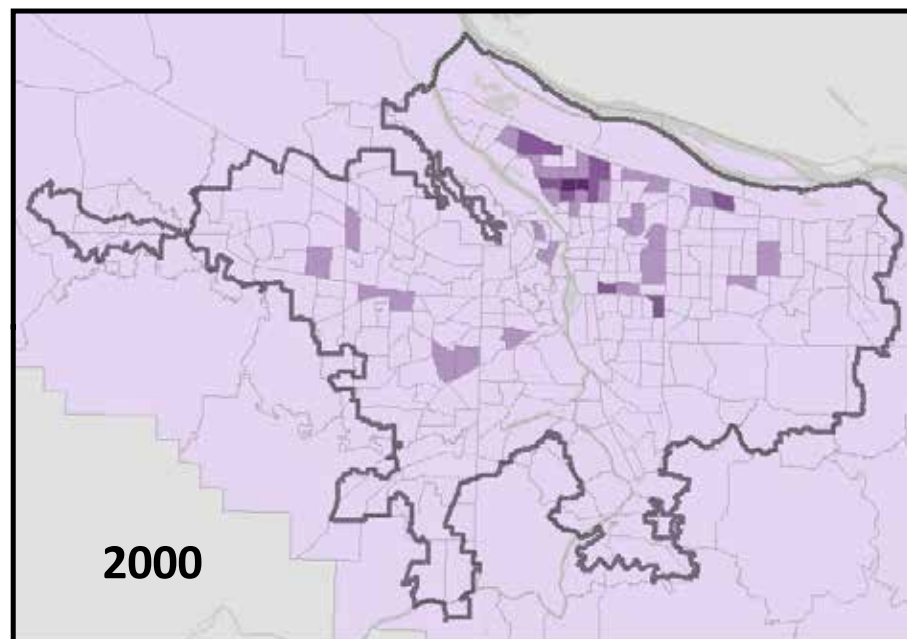
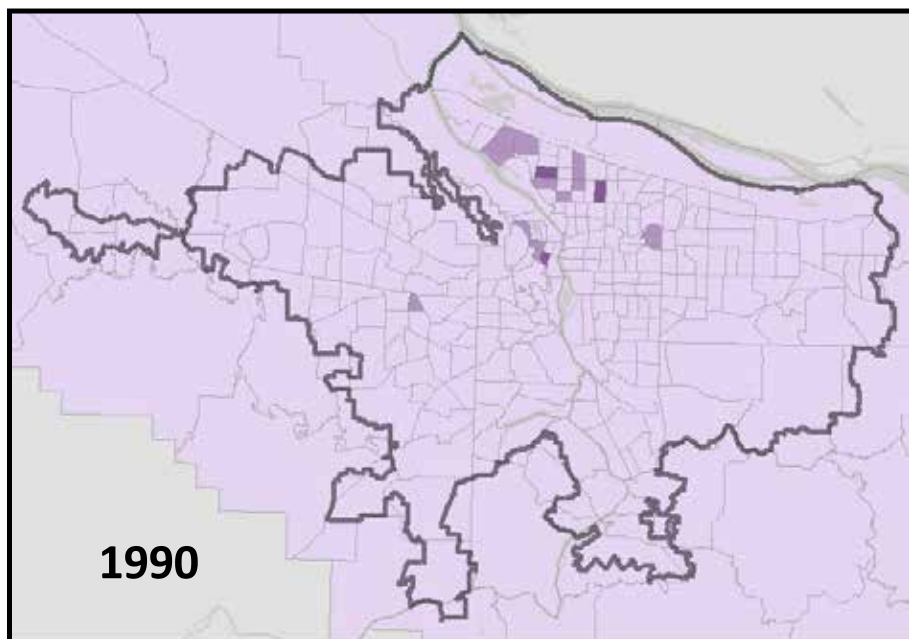


Black or African American per Acre

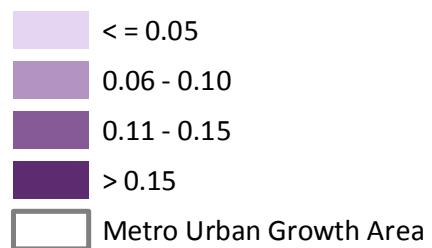


Intermediate Source: PSU Population Center
 Primary Source: Census Bureau

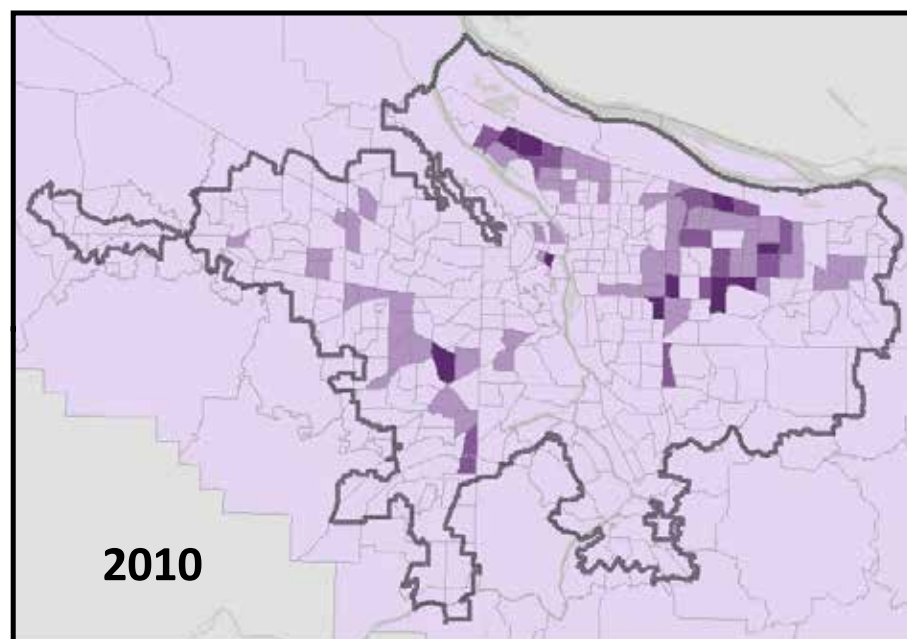


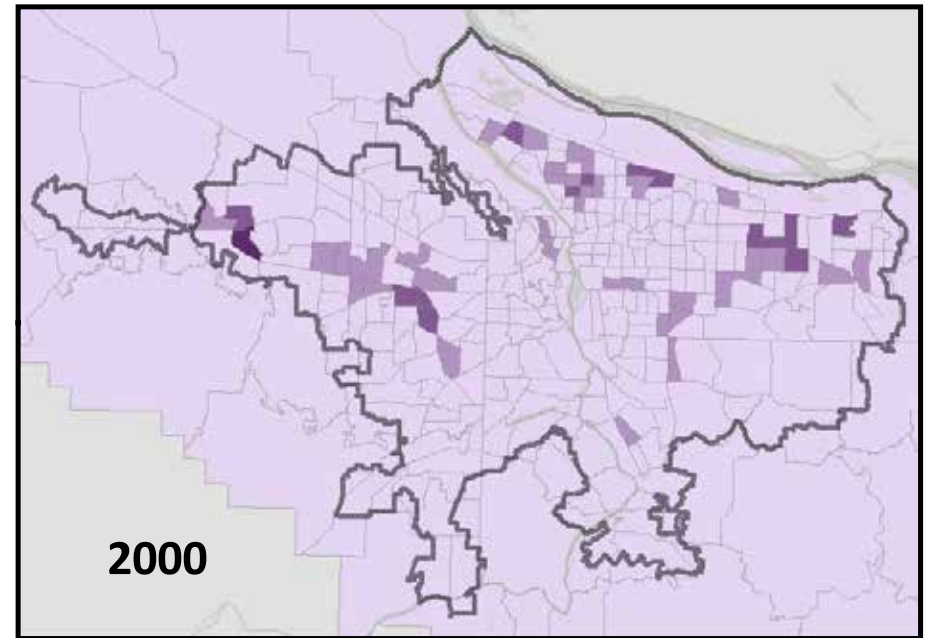
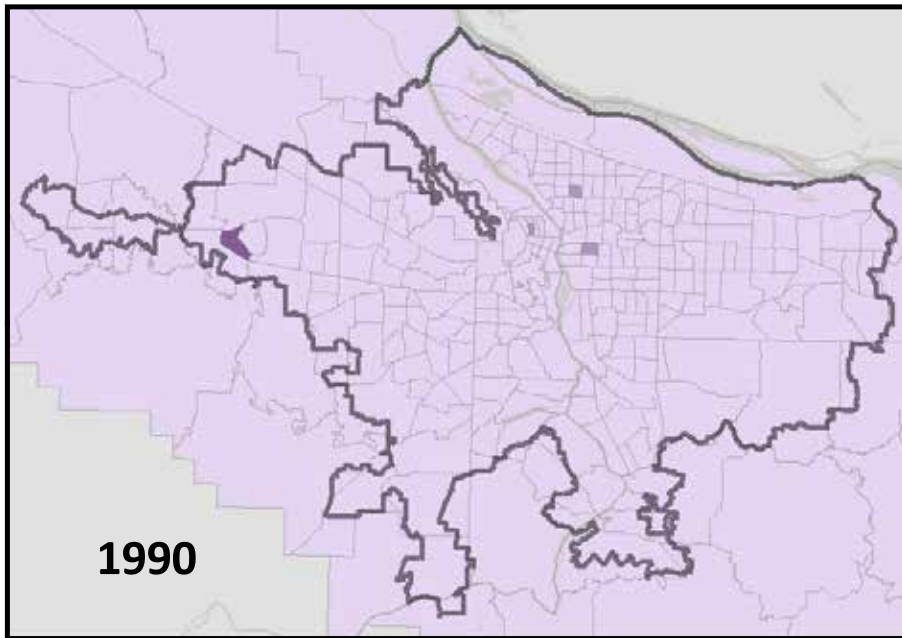


Hawaiian, Pacific Islander per Acre

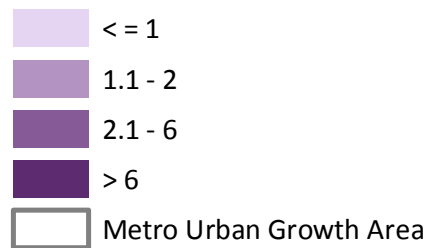


Intermediate Source: PSU Population Center
 Primary Source: Census Bureau

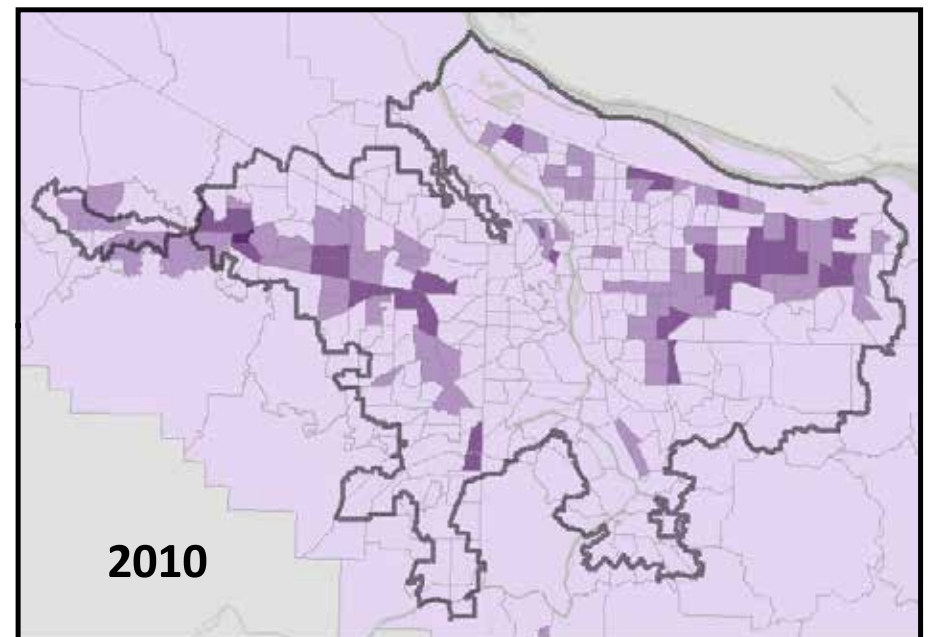


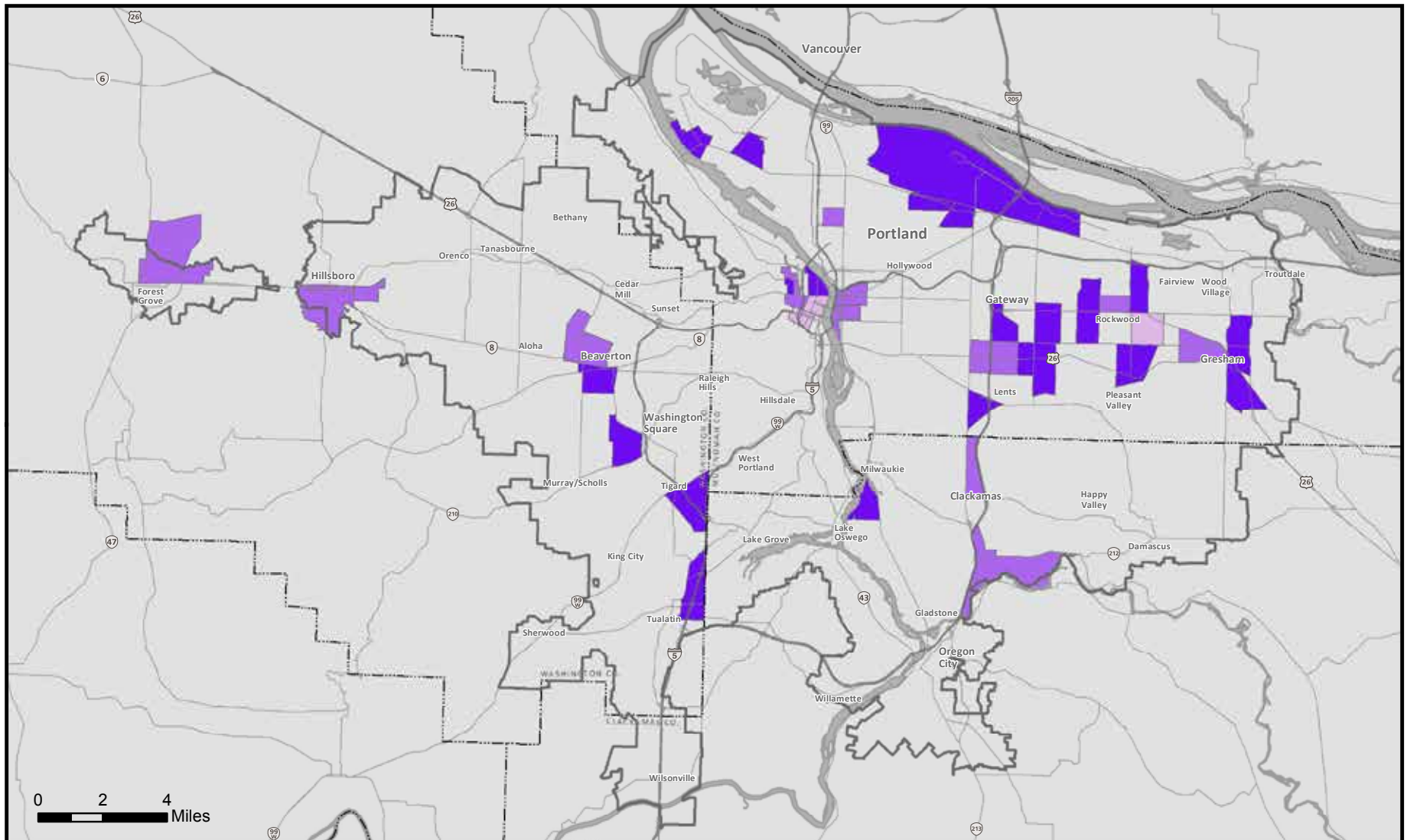


Hispanic or Latino per Acre



Intermediate Source: PSU Population Center
Primary Source: Census Bureau





Median Income below \$39,580 (200% Poverty Level, Household of 3)

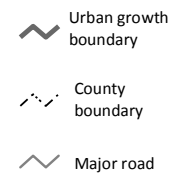
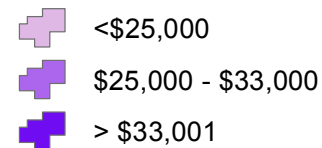
Census Tracts

December 2014

Source: American Community Survey (ACS 2008-2012).

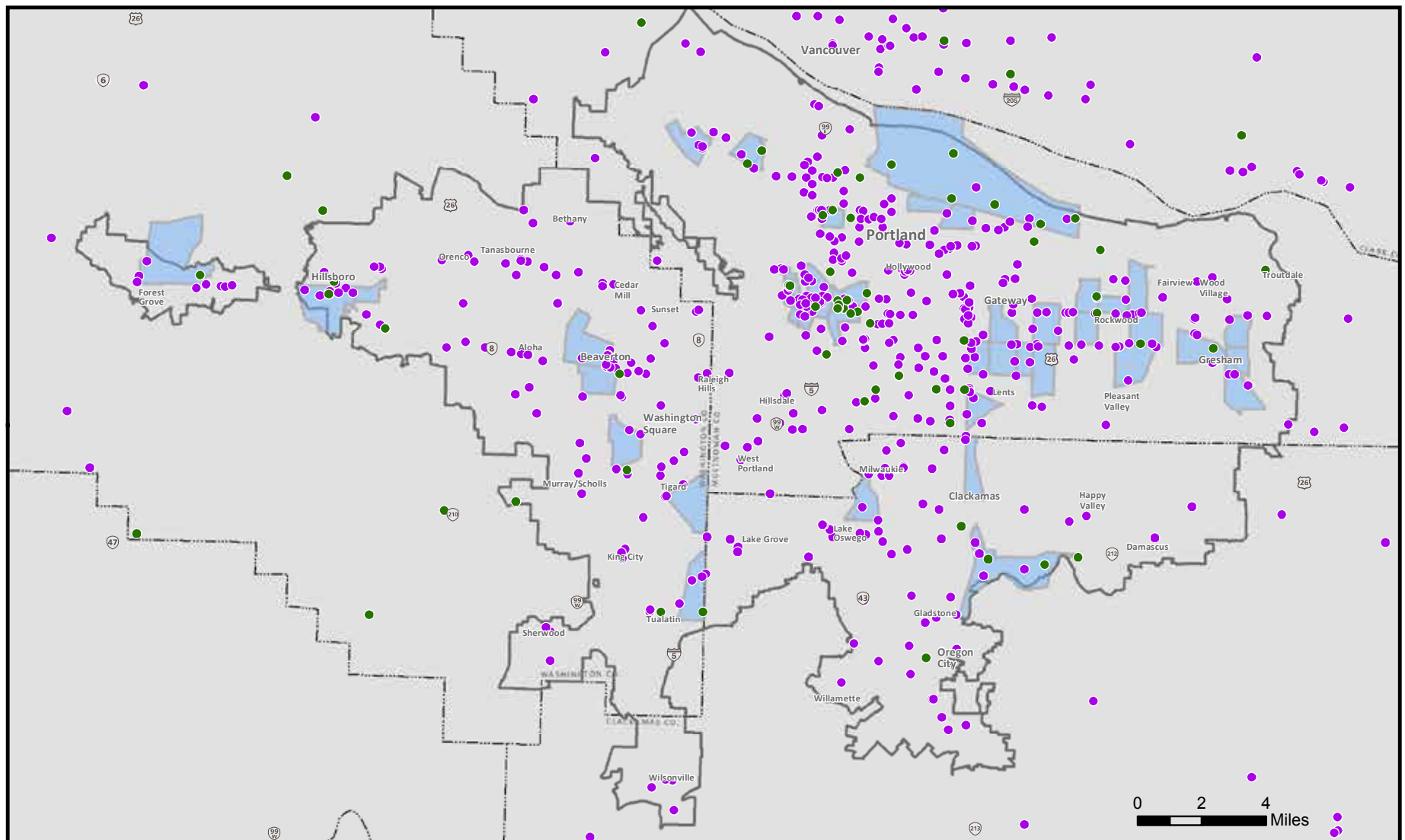
Displayed Tracts have a Coefficient of Variation of 40% or better (medium and low uncertainty).

Median Income



APPENDIX C

Some Geographies of Equity/Inequity

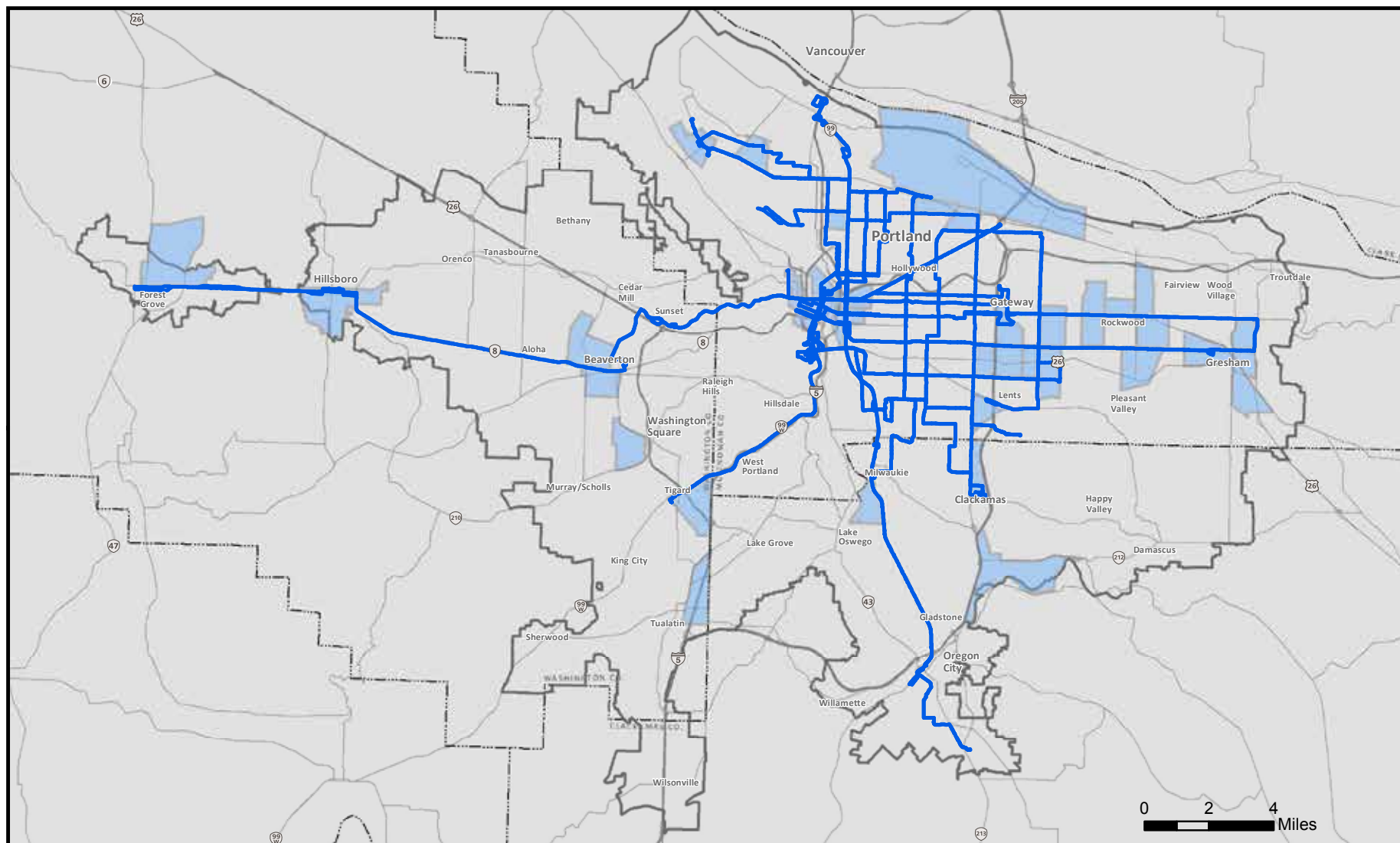


Farmer's Market's, Produce Stands, and Full Service Grocery Stores; Below Regional Median Income Tracts

Intermediate Source: Equity Atlas
 Primary Source: ESRI Business Analyst; 2010 Census
 Date: 2012

- Farmer's Markets and Produce Stands
- Full Service Grocery Stores
- Census Tracts with Median Income below 200% Poverty Level (\$39,580)
- 2010 Census tracts

- Urban growth boundary
- County boundary
- Major road






Transit Lines with Off-Peak Frequent Service*; Below Regional Median Income Tracts


*Off-Peak Frequent Service: Minimum of 20-minute headways during the time periods of 9 am - 3 pm and 6 pm - 10 pm.


Intermediate Source: Equity Atlas

Primary Source: 2010 Census; TriMet GTFS

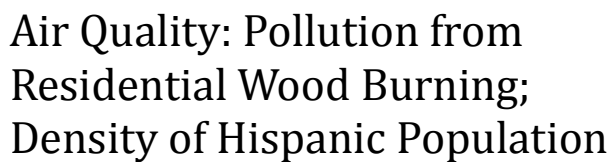
Date: Equity Atlas: 2012; TriMet: 2014




-  Transit Lines with Frequent Off-Peak Service
-  Census Tracts with Median Income below 200% Poverty Level (\$39,580)
-  2010 Census tracts

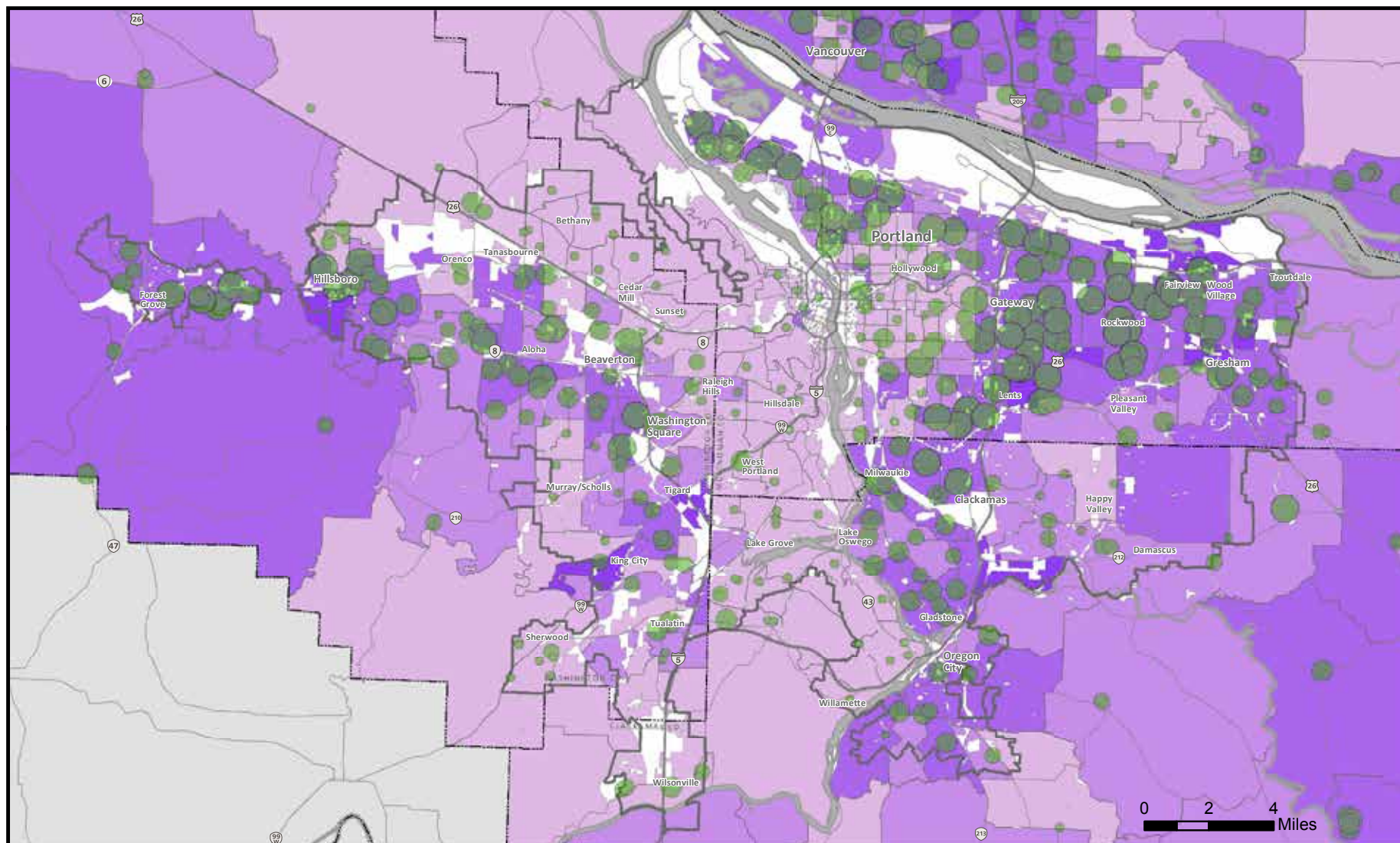
 Urban growth boundary

 County boundary

 Major road



 Urban growth boundary
 County boundary
 Major road



Rate of Diabetes; Percent of Students Receiving Free & Reduced Price Lunch

Intermediate Source: Equity Atlas
Primary Source: Oregon Health Care Quality Corporation insurance claims
Date: 2011

Percent Free & Reduced Lunch

- 2 - 30%
- 31 - 45%
- 46 - 70%
- 71 - 95%

Rate of Diabetes (census tract)

- 0 - 6.1%
- 6.2 - 7.8%
- 9.7 - 11.5%
- 11.6 - 19.7%
- Data Not Available (999)
- Unpopulated area

- Urban growth boundary
- - - County boundary
- Major road

Equity Baseline Report
Part 1: A Framework for Regional Equity
January 2015