



OFFICE of EQUITY
and HUMAN RIGHTS
CITY OF PORTLAND

**RACIAL
EQUITY
PLAN
MANUAL**



JANUARY 2016

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BACKGROUND AND CONTEXT

While Portland may consider itself a fair and just city, People of Color within the City of Portland continue to fare worse than their White counterparts in every area: housing, employment, education, justice, and health. The City of Portland has not made significant changes for employees or residents of color despite years of effort.

Because the City has a unique responsibility to all residents, these racial inequities must be addressed. Research into the persistent inequities indicates that we must go beyond individual, intentional prejudices and examine the systems in which we all live. We must investigate—honestly—how our longstanding systems, policies, and practices unintentionally support racial inequity, and we must change them. From this determination, the City, assisted by the Portland community, created the Office of Equity and Human Rights (OEHR) in 2012.

OEHR has been tasked to focus specifically on race and disability. OEHR’s mission is:

Provides education and technical support to City staff and elected officials, leading to recognition and removal of systemic barriers to fair and just distribution of resources, access and opportunity, starting with issues of race and disability.

In July 2015, City Council unanimously adopted Citywide Racial Equity Goals and Strategies as binding City Policy, providing a guidepost for City employees and leadership to follow, to achieve the racial equity goals. OEHR is using the Equity Goals and Strategies to develop guidance for City bureaus to create their own five-year Racial Equity Plans. Plans are being developed after a period of research and information gathering by each bureau.

A Racial Equity Roadmap assessment¹ was created by the former Citywide Equity Committee. It is an optional tool for bureaus to assess themselves before developing Plans. The Racial Equity Roadmap assessment was created by a dedicated team of City staff from across bureaus. A Racial Equity Plan template was created by OEHR after a national scan of promising practices from other cities who developed strategic plans for racial equity and the organizational structures to support the planning and implementation.

WHAT IS RACIAL EQUITY?

A focused effort to address persistent racial disparities allows the City of Portland to make more significant progress than if we were to address disparities across multiple identity lines simultaneously. Racially equitable programs, policies, and practices benefit all, not just people of color.

When is Equity Realized?

Equity is realized when identity – such as race, ethnicity, gender, age, disability, or sexual orientation – has no detrimental effect on the distribution of resources, opportunities, and outcomes for group members in a society.

¹ We would like to offer special thanks to the All Hands Raised project and the Racial Equity Strategy Guide developed by the Urban League of Portland, in concert with City of Portland staff.

ACHIEVING THE CITY'S VISION OF RACIAL EQUITY

The City's vision of racial equity is expressed by the adopted Citywide Goals and Strategies. Racial Equity Plans will layout each bureau's approach to operationalizing these goals and strategies while also articulating any additional unique goals and strategies of each bureau.

CITYWIDE RACIAL EQUITY GOALS & STRATEGIES



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EQUITY GOAL #1

We will end racial disparities within city government, so there is fairness in hiring and promotions, greater opportunities in contracting, and equitable services to all residents.

EQUITY GOAL #2

We will strengthen outreach, public engagement, and access to City services for communities of color and immigrant and refugee communities, and support or change existing services using racial equity best practices.

EQUITY GOAL #3

We will collaborate with communities and institutions to eliminate racial inequity in all areas of government, including education, criminal justice, environmental justice, health, housing, transportation, and economic success.

OVERALL STRATEGIES

- 1 Use a racial equity framework:**
Use a racial equity framework that clearly articulates racial equity; implicit and explicit bias; and individual, institutional, and structural racism.
- 2 Build organizational capacity:**
Commit to the breadth and depth of institutional transformation so that impacts are sustainable. While the leadership of electeds and officials is critical, changes take place on the ground, through building infrastructure that creates racial equity experts and teams throughout the city government.
- 3 Implement a racial equity lens:**
Racial inequities are not random; they have been created and sustained over time. Inequities will not disappear on their own. It is essential to use a racial equity lens when changing the policies, programs, and practices that perpetuate inequities, and when developing new policies and programs.
- 4 Be data driven:**
Measurement must take place at two levels—first, to measure the success of specific programmatic and policy changes; and second, to develop baselines, set goals, and measure progress. Using data in this manner is necessary for accountability.
- 5 Partner with other institutions and communities:**
Government work on racial equity is necessary, but insufficient. To achieve racial equity in the community, government needs to work in partnership with communities and institutions to achieve meaningful results.
- 6 Operate with urgency and accountability:**
When change is a priority, urgency is felt and change is embraced. Building in institutional accountability mechanisms using a clear plan of action will allow accountability. Collectively, we must create greater urgency and public commitment to achieve racial equity.

OEHR is providing a template for bureaus' Racial Equity Plans structured to span five years. At the end of five years, bureaus should conduct an in-depth evaluation to see how they have progressed over time. The Plan is *outcome driven* and bureaus are expected to report not just on actions, but also on the outcomes of those actions. If an action is not producing the desired outcome, bureaus can re-evaluate and adjust their efforts. By using a single plan template across all bureaus, the City of Portland and community will be able to compare racial equity work across all bureaus in an "apples to apples" comparison.

We are undergoing a reprioritization of our work at the City of Portland and working to change a long standing system built to benefit a community that has changed around us. We are creating a shared practice and forming relationships across the City structure. We are also creating a culture of learning and reflection to improve upon our work as we go. With few examples of local governments directly addressing racial inequities to draw upon, this is an opportunity for your bureau to break relatively new ground. Your planning process is an opportunity to take a step back and ask difficult questions, knowing that we may not have the answers, and set an actionable course toward achieving racial equity. OEHR, your peers, and our network of national partners are all here to help troubleshoot, and to share resources and promising practices.

PREPARATION

Successfully developing a bureau Racial Equity Plan will require preparation.

CORE TEAM AND ORGANIZATIONAL STRUCTURE

CO-LEADS AND CORE TEAMS

Each bureau's director should identify two Co-leads who will oversee the project and be the main points of contact for OEHR. Co-leads should work with their director and/or leadership team to recruit staff to form a Core Team, a small group who will shepherd the bureau through the entire process. The form and composition of your Core Team will depend on the size and structure of your bureau; however, the function of your team will include:

- *Project Design* - Designing the scope, structure, and timeline of the process.
- *Project Management* - Coordinating the meetings and communications, producing materials, and submitting deliverables.
- *Research and Systems Change Analysis* – Designing information gathering instruments and facilitating discussions to solicit qualitative information. Analyzing your bureau's systems for burdens on people and communities of color. Synthesizing information gathered to identify gaps in racial equity best practices and report on findings and recommendations.
- *Strategic Planning*– Designing exercises and facilitating discussions to identify goals, objectives, strategies, actions, and measures.
- *Communications* - Communicating with leadership and staff about the purpose of this process, updates on the process, and being a point of contact for anyone with questions.
- *Racial equity focus* - Maintaining a clear focus on racial equity throughout all stages of the process, working with any resistance that arises, and providing equity resources for participants who lack the skills needed to meaningfully participate.

Some considerations as you compose the Core Team include:

- *Authority* –The Core Team will need to ask staff in different divisions/programs/departments to provide information and to take various equity actions. They need to have sufficient authority to make these requests. This could be done by either having upper management staff on the team or by explicit and public authorization from the Director to oversee the project.
- *Expertise* – Team members will need to collectively possess a robust set of skills to fulfill the functions listed above. People with a strong racial equity analysis, some experience with strategic planning, and a good project manager are especially important.
- *Familiarity* – All team members should be very familiar with the City's philosophy on racial equity and the language we are using. They also need familiarity with the bureau's organizational structure and its decision making processes.
- *Time* – The Core Team should be given dedicated time for this project. The time commitment will vary dramatically depending on the capacity of the core team, the size of the bureau, and the scale of the process. Time commitments could range from 10-40 hours a month.
- *Composition* – Each Core Team will look different and be a different size. Ideally, team members would represent the demographic diversity of the bureau. Racial/ethnic diversity is especially important. Ideally, team members would also represent the different divisions or programs across the bureau.

Representation from up and down the bureau’s hierarchy is also ideal, though if leadership is represented then it is important to be sensitive to power dynamics so all members feel empowered to meaningfully participate. Tenure and union representation are also important considerations. Representativeness is something to strive for but should not eclipse the need to recruit members with the skills sets listed above. The Bureau Equity Committees are a likely place to find qualified and willing participants.

ORGANIZATIONAL STRUCTURE AND SCALE

The Core Team should develop an appropriately scaled organizing structure for this process. Not every staff person in the bureau needs to or has to be involved. The size and complexity of a bureau is one factor shaping this project’s scope. The racial equity expertise within the bureau is another.

OEHR recommends a project structure that mirrors the bureau’s existing organizational structure. Engaging a bureau’s leadership team is critical regardless of their racial equity expertise and they are likely small enough to engage as a group. They will need to be engaged in both managing the process and providing substantive input in all phases. Engaging the top-level managers could be done as a group and/or with each manager participating in the engagement of their division or program staff. Managers of color and/or with racial equity expertise could also be considered for individual interviews to provide more anonymity.

Engaging entire divisions or large programs may prove impossible. OEHR recommends the Core Team work with managers of larger divisions or programs to recruit a small team of staff to represent. These staff should have the most familiarity and experience with the concepts of racial equity in addition to be familiar with the work of the division or program.

The Core Team should consider creating a graphic of their agreed upon organizational structure to use as a communications tool.

PROJECT PROCESS AND DELIVERABLES

Recommended steps for this work are outlined below. The size, structure, and functions of each bureau make it difficult to provide one-size-fits-all guidance. Consider these steps as a loose guide as you create your Plan. Please tailor these steps to meet your bureau’s needs.



Bureaus are expected to submit three products to OEHR, listed below. OEHR recommends Core Teams work with their leadership to develop agreed upon decision making protocols/processes for vetting each of these products internally. Details on each are provided in this guide. OEHR will arrange for a debrief meeting with the Core Team to go over the reports and feedback.

1. Research Findings
2. Racial Equity Plan
3. Annual Updates

Note, some bureaus have the advantage of existing strategic plans with committed goals, objectives, strategies, and actions related to racial equity. Please consider using those in this Plan as a foundation from which to build upon. Additional content can be added to this plan to round out your bureau’s existing equity

work if needed. Also, some bureaus have existing or planned processes to create broader strategic plans. Please consider using those processes to create this Plan rather than duplicating efforts which may lead to staff confusion and burnout.

THE BUREAU

OEHR recommends that the Core Team work with the Director and leadership team to communicate to all bureau staff the purpose and importance of this work, how it relates to the bureau's work overall, and how it fits into the Citywide work on racial equity. This context is especially important for those staff with little or no exposure to racial equity work.

We recommend the Director send out a bureau-wide email introducing the Core Team, giving them authority to oversee the process, and explaining what to expect. An accompanying FAQ is recommended. Another recommended preparatory step is to present an overview of the context and process at meetings where staff from all divisions and programs are represented, such as an all-staff meeting or managers' meeting.

The planning process and the plan itself will require bureau resources to implement: time, money, skills, and effort. Each action item is expected to be assigned to individuals or a team within the bureau. Bureaus are expected to be willing to change their policies, the way they do business, their habits, and cultures that exist within the organization. These expectations should be acknowledged and built into bureau work plans and budgets.

Racial equity training is a critical pre-requisite for meaningful participation in any phase of this project. It is now required that all staff in the bureau attend OEHR's basic racial equity training course, as a foundation for building a shared analysis and definitions for racial equity work. Additional training on strategic planning for racial equity is also being provided by OEHR to Co-leads and a limited number of Core Team members.

SUPPORT

OEHR is a central point of contact for questions, training and support during the process. In order to increase support for bureaus we are convening bureaus into cohorts in similar phases of the process. Monthly meetings of Co-leads in each cohort will be an opportunity to share challenges/successes, receive guidance on managing this process, and solicit advice from your peers. The cohorts are being supported by co-facilitators from other bureaus who are also another resource for Co-leads. Co-leads will also be encouraged to support each other and increase each other's capacity.

Resources available include the Roadmap webpage, which includes background and training materials, sample materials, frequently asked questions, and contact information for specific assistance.

OEHR will hold open office hours to help Bureaus through the process. Annual progress reports will have a mechanism for flagging areas where Bureaus need support. Extra assistance can be provided upon request.

RESEARCH AND INFORMATION GATHERING

The Core Team will develop a research methodology and oversee the process to collect and analyze information on the current status of racial equity across the bureau's operations, practices, workforce, culture, policies, and programs. This will help identify key areas where a bureau can improve racial equity and solicit ideas for making improvements.

Methodology and Process

Before developing a methodology for gathering information, OEHR recommends taking an inventory of what racial equity information the bureau is already tracking and how useful or reliable is it. Then you can ask what information is not being tracked and what the possible approaches are to collecting it.

The Roadmap assessment is an optional tool available from OEHR and is designed for bureaus to use in the research and information gathering phase. The Roadmap includes a baseline assessment and evaluation of gaps within a bureau. Instructions for using the Roadmap assessment are provided below.

Other research instruments and methodology can be used to gather information on a bureau's culture, structure, and use of racial equity best practices. The categories of practice (domains) and the questions included in the assessment are a valuable resource. If you choose not to use the Roadmap assessment, OEHR recommends you still use the categories of practices and questions as a guide to develop your own research approach and tools. Methodology could range from reviewing source documents (ex. strategic plans, program materials, communication materials, etc...), individual interviews, administering a simple online survey to facilitating in-person focus groups (ex. leadership team, managers, division/program teams, etc...). It can be completed by bureau staff or outside consultants.

Sample Process for Research and Development of Recommendations



Qualitative and Quantitative Data

Regardless of which approach you choose, it is important to create opportunities for group dialogue and analysis. Many of the most important and complex questions may not be suitable for an online survey and should be considered for facilitated discussions. The richest information gleaned from the assessment questions will not be the score but the participant's reasoning for selecting a score. This is not easily captured by an online survey. Facilitated discussion provides participants the opportunity to clarify the questions, listen to each other's analysis, and also begin to identify solutions which can be mined later in the Plan development phase.

For group discussions, OEHR recommends Core Teams use experienced facilitators, create facilitation guides, distribute questions ahead of time to participants, assign a note taker, and distribute notes to participants afterwards.

For any survey analysis, OEHR recommends you conducted cross-tabulations based on managers and non-managers, race, and teams. In the case of small numbers of people in some categories and confidentiality, you may want to combine racial data into Whites and People of Color and only highlight team differences for the largest teams.

INSTRUCTIONS FOR THE ROADMAP ASSESSMENT

TAB 1: BUREAU PROFILE

Section 1: Bureau Roadmap Information

This section includes the Director or Commissioner in Charge, the names of the Core Team, Title VI coordinator and a list of the bureau's primary divisions or programs. If a division or program is listed here, it should perform the baseline assessment as an independent entity. Large bureaus may have several separate divisions or programs participating, small bureaus may only have a couple.

Section 2: Bureau Workforce Demographics

This is the demographic information about the bureau. It breaks down the race of bureau staff, based on information drawn from the City's employee information services. It further analyzes the information by providing racial data for management staff, and represented staff, if any.

Basic bureau racial information can be found here: <http://www.portlandoregon.gov/oehr/eoswf.cfm>

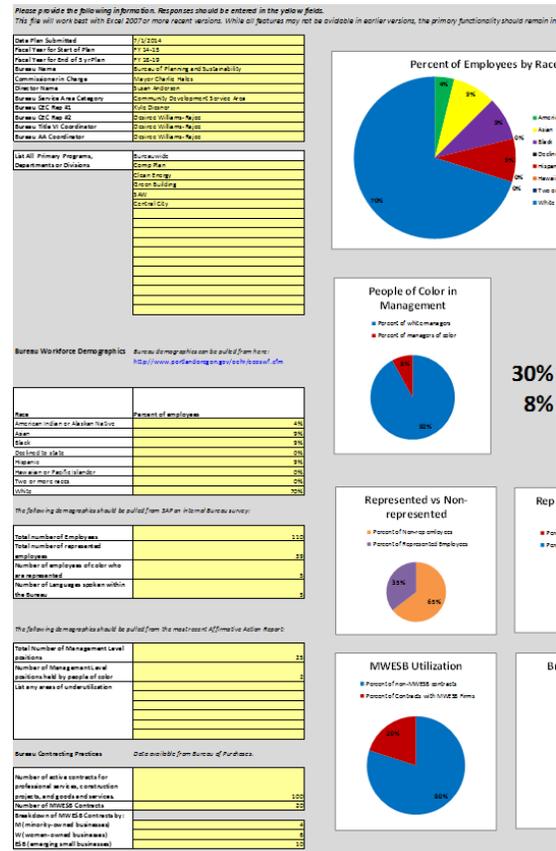
Bureaus will have to create an internal process to determine the percentage of People of Color in management positions, represented employees, and those who speak languages other than English.

Section 3: Bureau Contracting Practices

The City of Portland participates in a Minority, Women-Owned, Emerging Small Businesses program to increase contracting with People of Color and other underutilized contractors. This section analyzes the bureau's MWESB practices, and specifically identifies contractors of color. The bureau will have to contact Purchasing to get this information.

As data is entered into the spreadsheet, several graphs will be developed to provide a quick visual reference on the bureau's current racial make-up and some of its practices.

The Bureau Profile page is used by OEHR to help give them a snapshot of information about the bureau, and is a useful collection of baseline information for the bureau as well.



TAB 2: ASSESSMENT

The assessment is used to evaluate where the bureau is and provide an evaluation of gaps that need addressing. Bureaus should ensure that enough time and resources are available to answer the assessment questions thoroughly.

The assessment consists of 41 questions divided into six domains. These questions are intended to help bureaus determine where they are *now* in progress towards racial equity. Questions can be rewritten for greater clarity or tailored to the bureau’s needs.

Answers fall in a range of 0-5, and the definitions of the range are described on the tab. Please be aware that 0, or not applicable, should be rarely used in the assessment.

There are vertical columns available for different programs within the bureau that are large enough to answer the assessment individually. Each header is populated from the Bureau Profile tab where programs are entered.

Bureau of Planning and Sustainability		Equity Baseline Assessment			FY 14-15
Responses Include:		<i>Directions:</i> In the blank cells below each program or department select best describes where your organization is in relation to the 41 equity practice responses are listed at the top left. Cells will become colored once a number for recommendations about next steps.			
0	This is not relevant or does not exist in our Bureau of department				
1	Haven't started work in this area yet or this may happen on an 'as-needed' basis				
2	Plans exist to do this but have not yet been implemented. It may happen but inconsistently and with limited success	Bureauwide	Division/Program 1	Division/Program 2	
3	This is in place, or occurs regularly. We have evidence of its use and are assessing its effectiveness.				
4	This is in place with clear evidence of success. Structural change has been made in order to be effective in this area				
5	This is part of our routine, and identity. We model it for others. Practice has resulted in effective sustainable changes				
A. Organizational Commitment					
1	Public written commitment to address/eliminate racial and ethnic inequities exists in guiding documentation: mission, vision, goals.	4			
2	Operational commitment to address/eliminate racial and ethnic inequities is visible in the organization. (i.e. physical characteristics of offices and location, Standard Operating Procedures)	3			
3	Development and monitoring of racial equity plan, or strategy integrates perspectives from staff and constituencies of color.	5			
4	Representatives from communities of color are participants in strategy development for any program, policy, or service that impacts them.	3			
5	There is ongoing evaluation of policy, service, or program impacts and progress towards racial equity.	4			
6	Staff have a shared language on race, racism, and social justice and are culturally responsive and inclusive in communication	5			

Individual divisions or teams should answer the survey questions from their own perspective and experience. If your bureau is very small, and will only be responding to the questions at the bureau level, use the first input column and list Bureau wide, instead of program names, on the Profile Tab.

Section 1: Organizational Commitment

This section reflects the bureau’s commitment to racial equity at the policy, planning and budget level. It also includes questions about the general office environment for staff regarding discussions about race and racial equity. The bureau’s EEO and AA practices can help inform this section.

Section 2: Leadership and Management

This section explores the way leadership and management level practices affect the bureau’s ability to advance racial equity. Several of the questions are about how leadership supports racial equity in the bureau, and among their employees. There is an important question about networking at the leadership level – to help support management and leadership staff in the hard work of racial equity.

It is important when getting feedback from line staff to build in some way to protect staff from retaliation or fear of retaliation for providing honest, if negative, feedback. If you have questions about how to best do this, we encourage you to contact OEHR for assistance.

Section 3: Workforce

These questions address how racial equity goals and practices are embedded in workforce development and hiring. The bureau’s AA coordinator can be very helpful in responding to this section.

Section 4: Community Access and Partnership

This section looks at how the bureau engaged with external partners and the City of Portland community in regards to racial equity. Even internal service bureaus will still have the ability to respond to this section as they all operate in service to the public, even if only indirectly. For example, other bureaus can be considered partners and, technically, all City bureaus are open to questions and input from residents of the City. Even if your bureau is internally focused, please review this section carefully to consider how the questions would apply.

If you have a Bureau Advisory Committee, they can provide valuable feedback for this section.

Section 5: Contracting

This section asks about the bureau's contracting practices. The bureau should have a contract manager that can help with this section. The bureau may also work directly with Purchasing to obtain the required information to breakdown their MWESB contracting numbers on the Bureau Profile Tab.

Section 6: Data, Metrics and Continuous Quality Improvement

This important section reviews how bureaus collect information and track the results of their actions to improve racial equity. Bureau practices in this area may help later in the process when developing a racial equity plan and identifying methods for tracking progress.

It is likely that data collection is dispersed among different programs within the bureau and the Roadmap tool is one way to help bureaus centralize racial equity metrics.

TAB 3: EVALUATION

The Core Team is responsible for compiling, sorting, and summarizing the qualitative and quantitative data collected.

The Roadmap assessment's evaluation tab provides a summary of quantitative results; average scores across all divisions or programs for each question. Average scores for each domain are also provided. Scores should be vetted by Core Team for accuracy. Any major discrepancies in the scores and the Core Team's vetting can be flagged and explained in the research findings. Discrepancies may be an indicator of flaws in the research methodology and process. They may also result from lack of participants understanding or expertise in the racial equity topics indicating a need for training which could become part of the Plan.

Scores are only one starting point for the Core Team's process to draw conclusions. This is also true for results from surveys and focus groups using non-Roadmap assessment questions. In both cases, the qualitative data gathered will be the richer source of information for the reasons stated on page 6.

RESEARCH FINDINGS

The Core Team is responsible for submitting a summary of research findings to OEHR and their bureau's leadership. OEHR will not disseminate this summary publicly but bureaus may choose to do so. You may also want to distribute these findings to all participants or even more broadly throughout the bureau. The process for vetting findings will depend upon the Core Team's agreed upon decision-making protocols. OEHR does not recommend a particular format for communicating these findings. A detailed memo or a more formal report are two examples of reporting forms.

The summary should answer the following questions:

- What research methodology was used? Who participated? How did leadership participate?
- What are the high level summary findings? Are there themes or trends identified?
- Where are the gaps in the bureau's use of best practices? Be specific about which divisions or programs. You may want to provide brief explanation for gaps.
- Were there any discrepancies between some results and the Core Team's opinion? Why do they exist and is there a recommended response?
- Where are the strengths in the bureau's use of best practices?
- What opportunities for change does your research suggest? What are the Core Teams recommendations for the Action Plan?

THE PLAN

Drawing on either the Roadmap assessment or the bureau's own evaluation of their current practices, the Core Team will create a Racial Equity Plan. The Plan should be an ambitious document. Bureaus are encouraged to partner with each other as well as outside groups and agencies to help them achieve their goals. Plans are submitted to the director for approval to then be reviewed by OEHR.

Each bureau's Plan will be designed to achieve the Citywide Racial Equity Goals and bureau-specific equity goals. Plans will use the Citywide Racial Equity Strategies² as well as bureau-specific strategies. Plans will have five- year objectives and specific actions to achieve those objectives. Effective actions should be specific, measurable, attainable, relevant and timely. Be sure your Plan includes sufficient funding, staffing, accountability mechanisms and evaluation.

This is the first time the City of Portland bureaus have created Racial Equity Plans so it is important to be creating opportunities for reflection and learning. No one has all the right answers. Making some mistakes is highly likely but do not let the fear of mistakes paralyze your process or the implementation of your Plan. The Core Team can provide a model of reflection and learning for the whole bureau to emulate.

Please refer to the following definitions of strategic planning terms as you craft your Plans:

1. *Goal:* The broad statements of what the City/bureau hopes to achieve over the long-term and are qualitative in nature. It is important that each goal is clear and can be supported by measurable objectives.

² Citywide Racial Equity Strategy 1 "Use a Racial Equity Framework" is inherent in a Racial Equity Action Plan. All actions in your Plan should focus on racial disparities though some may focus on the intersection of race and other oppressed groups.

2. *Objective*: A future state of being resulting from an improvement or change in the bureau. Strong objectives articulate a clear improvement or define how much improvement will take place. Beginning objectives with the words “increase” or “decrease” help with the latter.
3. *Strategy*: A major approach or method for attaining objectives and resolving specific issues. Strategies begin to answer the question, "How will we go about accomplishing our objectives?"
4. *Action*: They are the specific things your bureau will do to implement the strategies and achieve the objectives. Strong actions start with verbs.
5. *Performance Measure*: A quantifiable measure of how well an action is being implemented. Different types of measures include 1) Quantity - How much did we do? 2) Quality - How well did we do it? 3) Impact - Is anyone better off?
6. *Completion Date*: The month and year an action will be accomplished.
7. *Evaluation Tool*: The way a bureau will measure an action and know it is completed. Surveys, tracking systems, staff files, and specific deliverables are all examples.
8. *Lead*: The person or group responsible for the action.
9. *Oversight*: The supervisor or body that holds the lead accountable for completion.

1. Create a racial equity guiding statement for your Bureau

Use the Citywide Racial Equity Goals as a resource to draft a simple one sentence statement of your bureau’s role in achieving the Citywide goals. This statement will serve as a touchstone for your bureau as the details of your Plan are fleshed out. Please engage leadership in crafting or reviewing this statement.

Questions to consider when developing this statement are:

- What do each of the Citywide Racial Equity Goals mean to our bureau?
- How does our bureau’s mission statement relate to accomplishing the Goals?
- What does your bureau define as the most important racially equitable outcomes?
- What is your unique role in the City-wide effort to achieve racial equity?
- What positive principles or shared values are reflected in this guiding statement?

The racial equity guiding statements below are examples to refer to as you create your own:

- Portland Bureau of Planning and Sustainability: Develop planning and sustainability solutions that eliminate racial disparities thereby creating prosperous, resilient, healthy, and affordable communities for all Portlanders
- Seattle Public Utilities Service Equity Division: Provide strategic direction to position equity at the core of decision-making at Seattle Public Utilities.

2. Select a Citywide Equity Goal and create five year objectives

Select one of the Racial Equity Goals and then craft an objective that states the changes your bureau is committed to making in the next five years in order to advance that goal. Click on the text “Select a goal...” to view the list of Citywide Goals. A bureau may have a unique long-term goal that is not reflected in any of the Citywide goals. A bureau-specific goal can be used to create objectives as well and then included in the final plan. Write in the bureau specific goal into the cell rather than selecting a Citywide goal from the drop down menu.

Questions to consider as you craft objectives are:

- What needs or opportunities were identified during the information gathering phase of this process?

- What needs to be different in our bureau’s culture, workforce, and policies, practices, and procedures? What change do we ideally want (not just what we would settle for)?
- What does your department define as the most important racially equitable outcomes?
- What are some known racial inequities in our bureau’s field? What are the root causes or factors creating these racial inequities?
- How does our bureau’s relationship with communities of color need to change? How can those most adversely affected by the issue be actively involved in solving it?
- How will our proposed objective address root causes of racial disparities and advance institutional and/or systemic change?

Examples of objectives include:

- BPS: Shared project management approach that integrates equity at all phases (scoping, design, implementation, evaluation)
- Seattle Public Utilities: Position service equity as one of the primary filters for decision making by Q1 2018

3. Create actions to achieve each objective

Select one or more relevant Citywide Racial Equity Strategies your bureau will deploy to achieve the stated objective. Use each selected strategy to develop a clear action or set of actions. Again, a bureau may have unique strategies not included in the Citywide strategies. These bureau-specific strategies can be used to develop actions and then included in the final Plan.

Note: Your bureau’s actions (**where appropriate**) should include inclusive outreach and public engagement, including involving communities of color and immigrant and refugee communities.

Questions to consider when developing actions include:

- Were any actionable solutions identified during the information gathering phase of this process?
- What is a specific change in policy, practice or procedure that could help produce more equitable outcomes?
- How will an action decrease racial inequity?
- Are there any unintended consequences? Can they be mitigated?
- What capacity is needed to successfully implement the action?
- How will an action be implemented and by whom?
- Is the action achievable within the lifetime of the plan?
- Is the action measurable and how will it be measured?

Examples of actions include:

- BPS: Develop a customized BPS project management approach that integrates transformational values framework, equity tools, and community engagement
- Seattle Public Utilities: Implement an ongoing, sequential community engagement training and coaching process for all project managers

4. Create annual performance measures for each action and commit to a completion date

Each action should have a completion date (month/year) and performance measures for each year prior to that date. The final performance measure should be the tangible result each action will achieve. Measures

for the earlier years should indicate progress made during each year. You may wish to consider these questions as you develop a date and measures:

- What is your timeline?
- How will you evaluate and report progress over time?
- How will you know the action is complete?
- Can you retain stakeholder participation and ensure internal and public accountability?

Examples of tangible results to measure include:

- Seattle Department of Human Services:
 - 900 youth/young adults of color participating in the Youth & Young Adults Program made academic progress by achieving at least one of the following: GED completion, grade progression, credit retrieval, passing HSPE scores, on-time graduation
 - By Q4 100% of our Human Resources policies will have been evaluated and corrected as filtered through the racial equity toolkit.
- Dane County Racial Equity Framework: 75% of Dane County employees believe their department seeks input and assistance on decision making from communities of color.

5. Create or identify the mechanism by which each action will be tracked, measured, or evaluated

Actions with tangible results will have some mechanism for communicating those results. Examples include a deliverable such as a report or memo, survey results, staff files, or tracking tool.

6. Identify lead staff or position for each action and the person or body that holds the staff accountable for completion

The responsibility for completing actions should be delegated to an individual or position. Their supervisor and/or an overseeing body (ex. Bureau Advisory Committee) should also be identified.

Long-term Goal	Five Year Bureau Objective	Strategies and Bureau Actions*	Bureau Performance Measures					Evaluation Tool	Lead Staff	Oversight	Due Date
			Year 1	Year 2	Year 3	Year 4	Year 5				
Select a Citywide Racial Equity Goal from the drop down menu or insert a bureau-specific goal		Strategy: Build organizational capacity									
		Action(s):									
		Strategy: Implement a racial equity lens									
		Action(s):									
		Strategy: Be data driven									
		Action(s):									
		Strategy: Partner with other institutions and communi									
		Action(s):									
		Strategy: Operate with urgency and accountability									
		Action(s):									
		Strategy (Bureau specific):									
		Action(s):									

Tips for Writing an Easily Understood Plan

All bureau’s Plans are available to the public. To ensure the public can understand the City’s equity work, please follow these tips when writing your Plan:

- Use plain language to describe your goals, objectives, strategies, actions, and measures.
- Spell out acronyms.
- Double-check for spelling errors.
- Have a communications expert review the Plan

Recommend a Stewardship Plan

OEHR recommends the Core Team accompany their submission of a draft Plan to their director with a recommendation as to how the Plan will be stewarded.

Recommendations should include a proposal for an ongoing coordinating body to track and support implementation of the Plan. In some cases the Bureau Equity Committee may be well positioned for this role. Other considerations to make leadership aware of include any new staffing and resources required to implement actions. Also, some actions may be flagged for prioritization due to required immediate or near-term action.

REVIEW AND FINALIZING THE PLAN

Each bureau's internal process for reviewing the draft Plan will be different. The Core Team may want to circulate a draft Plan to all or some participants, similar to the process for sharing the research findings. At a minimum the bureau director signs off on the Plan before the Core Team submits for OEHR review.

OEHR is forming a Plan Review Committee composed of six members; 2 OEHR staff, 2 peer Co-leads, and 2 community members. The committee will collectively and individually review each Plan using the questions below. A form with the Committee's feedback and recommendations for improvements will be provided to Co-leads.

- Did the director sign off approval of the plan?
- Is the bureau profile page complete?
- Does the profile page list (known) major programs?
- Is the research findings summary complete?
- Does the Plan reflect the research findings?
- Does the Plan correspond to the Citywide Racial Equity goals and strategies?
- Are these goals and objectives addressing institutional changes or structural changes?
- Are the actions measurable and realistic?
- Do the actions reflect relevant best practices in racial equity work?
- Are there position or persons responsible for the actions?
- Is the Stewardship Plan realistic?
- Are there any multi-bureau trends developing?
- Similar obstacles or problems mentioned?
- Is there a great idea from a bureau that should be shared?
- Are there opportunities for different bureaus with similar actions to work together?
- Are there opportunities for the community to work with multiple bureaus on the same topic/issue?

ROLL OUT AND IMPLEMENT THE PLAN

Implementation of the Plan is perhaps the most critical step to create positive, meaningful change over time. The rollout of the Plan should support its implementation. The Plan is a public document so the rollout should occur externally as well as internally. Each will look different for each bureau depending on their organizational structure and their community communication structure.

Once the Plan is finalized, you will want to work with your leadership to distribute the Plan at multiple staff levels and in multiple venues. Your Bureau Equity Committee or communications staff could be good resources. The initial internal process may use similar communication strategies that were used when announcing the planning process; director sends all-staff email, presentation at all-staff and manager meetings, summary materials distributed, etc. Also important is the process of integrating the Plan’s actions, timelines, and measures into the development of annual division and program work plans and budgets. This may include any strategic planning processes planned or underway as well.

The release of the Plan will be a highly visible statement of the bureau’s intent and commitment to racial equity. OEHR recommends using this opportune moment to raise awareness about racial inequities, government’s role in eliminating inequities, and leaders’ commitment to eliminating inequities. Achieving these objectives during the rollout of the Plan will likely support many of the Plan’s actions.

An external rollout should at least include a presentation to the Bureau’s Commissioner and the appropriate City Council committee and the creation of a web page on the bureau’s website with the Plan and some basic background information and next steps including the annual reporting expectations. For those bureaus with more communication capacity, OEHR recommends a press release and postings on social media.

ANNUAL PROGRESS REPORTING

OEHR is tasked with tracking and reporting to Council on the progress of the City’s racial equity plans. They will compile the reports received from bureaus and present a summary to Council on an annual basis, including OEHR’s analysis and suggestions, if any.

Bureaus are expected to also report annually to City Council on progress implementing their Plan. An annual reporting excel sheet is provided to make reporting consistent and easy. There are two important columns at the right:

Challenges	Successes
<i>Document challenges that the action has faced and plans for addressing challenges or how the outcome or action might be refined in future reporting periods.</i>	<i>Document successes that have been achieved.</i>

OEHR will be reviewing these columns. By tracking challenges, OEHR will be able to see what obstacles are affecting progress towards racial equity Citywide and attempt to resolve those issues. Bureau successes can also be shared with others who are looking for best practices or assistance with their own racial equity goals. Please use as much space as needed to describe challenges and success.

Any proposed changes to the Plan should be accompanied by an explanatory memo.

Some things to consider when doing the yearly updates:

- Are there goal areas, objectives, or strategies that are receiving less attention than others?

- Is there a need to change the Plan?
- Have plan actions been implemented or in progress? What do the results indicate as to how to improve?
- If there are unmet or blocked actions, does the bureau have an action plan for resolving the issue, or explanation why they cannot progress?
- Are there racially diverse staff working on the plan over the year(s)?
- Are measures being recorded and updated as actions change or are completed?
- Is the bureau reporting on challenges and successes?

OEHR will review the bureau's yearly updates and provide feedback including suggestions for improvements or changes to the Plan.