An Evolving Approach To Embedding Equity In Investment Decisions

Using Data and Engagement to Advance Equity

PSRC Peer Networking Event

April 30, 2021

Community Profile

Portland (OR) Region

73 % are white

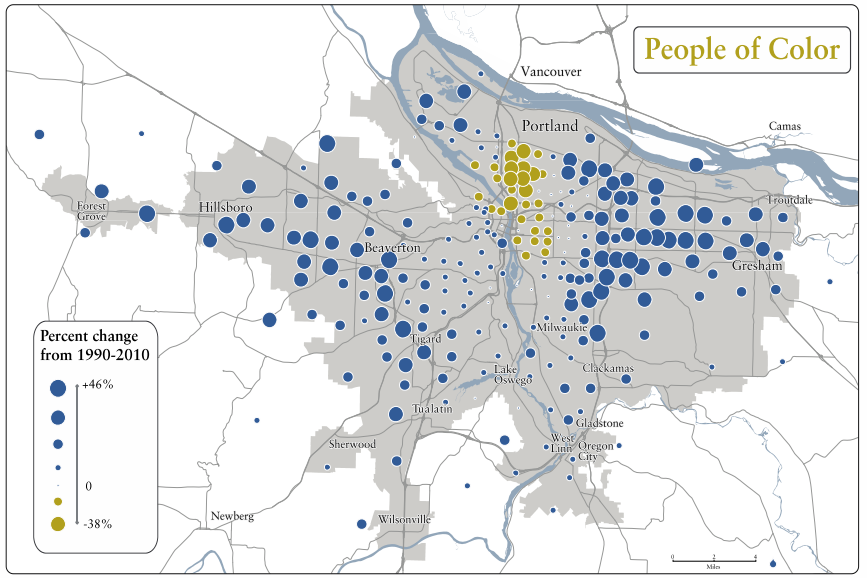
27% are of color

32 % < 200% FPL

23% are young'uns

Median household income: $59,821

11% are elders



1.6 million

(in 24 cities & 3 counties)

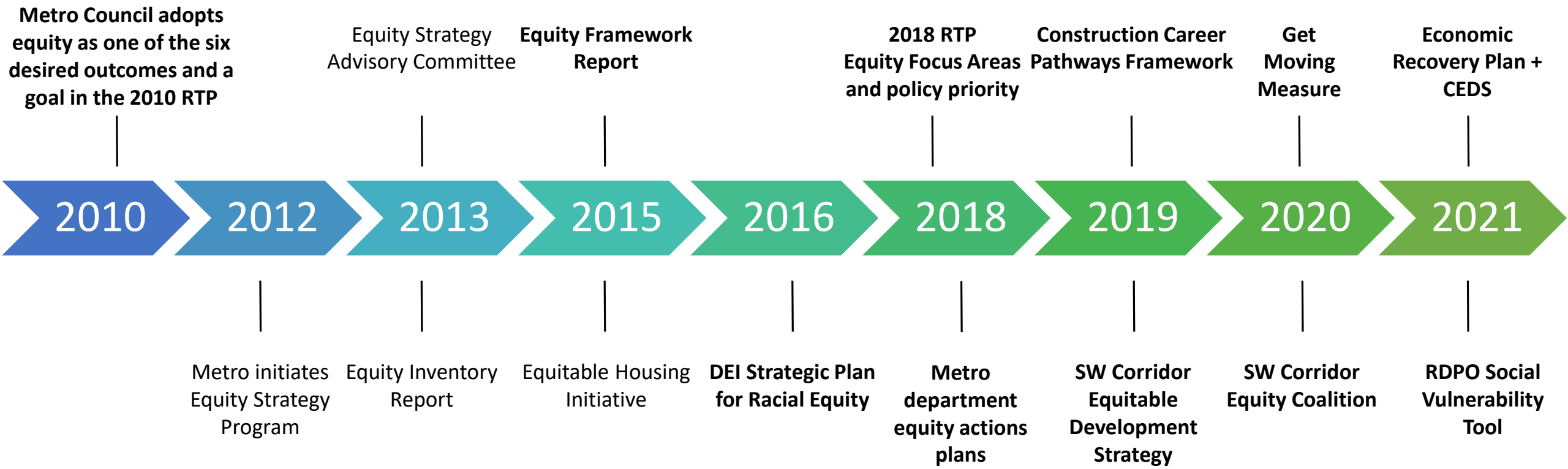
9%

are not confident speaking English

Metro

Source: U.S. Census Bureau, 2010 Decennial Census, 2015 1-year American Community Survey & ESRI 2016

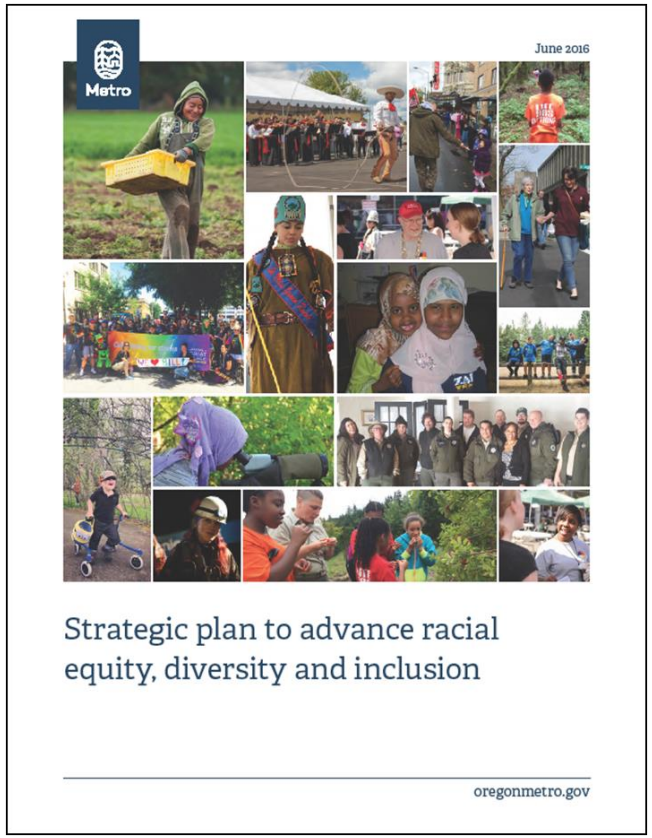
Metro + Social Equity



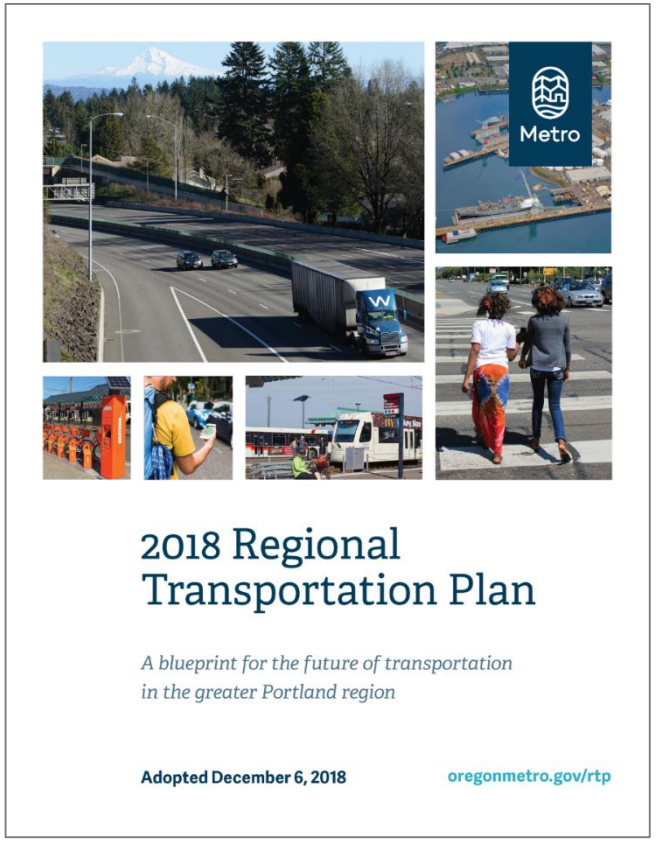
First plan to carryout the Strategic Plan to Advance Racial Equity, Diversity and Inclusion

Metro's six desired outcomes

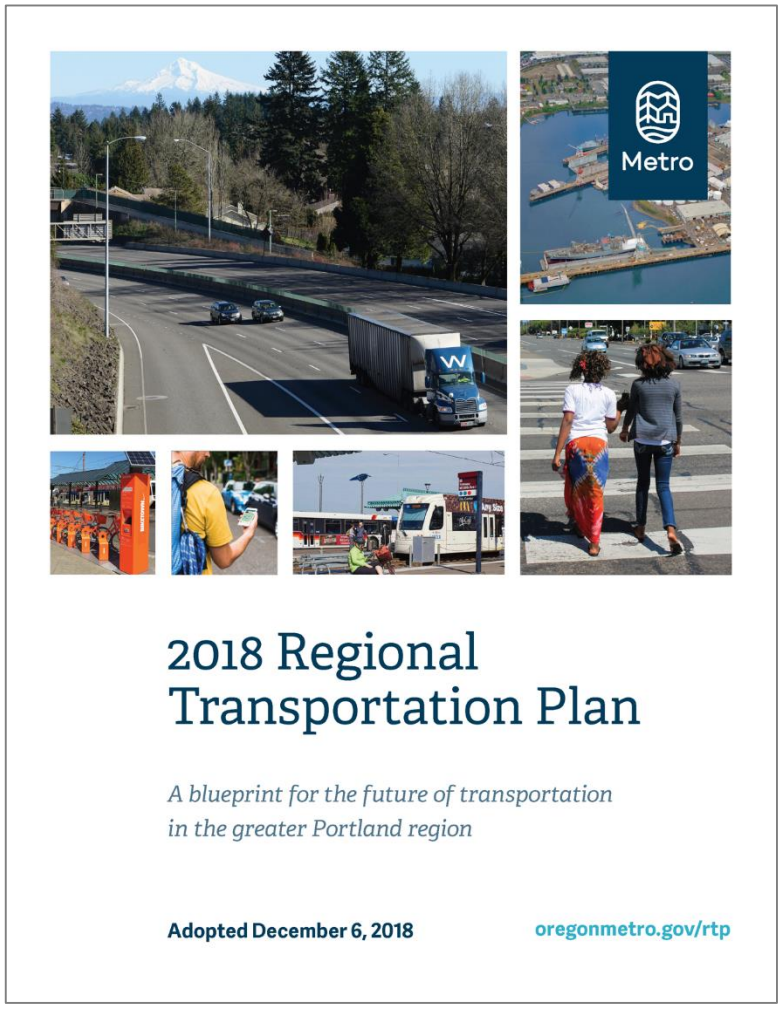
Strategic Plan to Advance Racial Equity, Diversity and Inclusion



2018 Regional Transportation Plan



Outcome-Based Regional Transportation Plan



2018 Regional Transportation Plan Investment Priorities

https://www.oregonmetro.gov/regional-transportation-plan

Focus of new equity policies and strategies

Prioritizing reducing disparities and barriers, particularly for people of color and people with low income

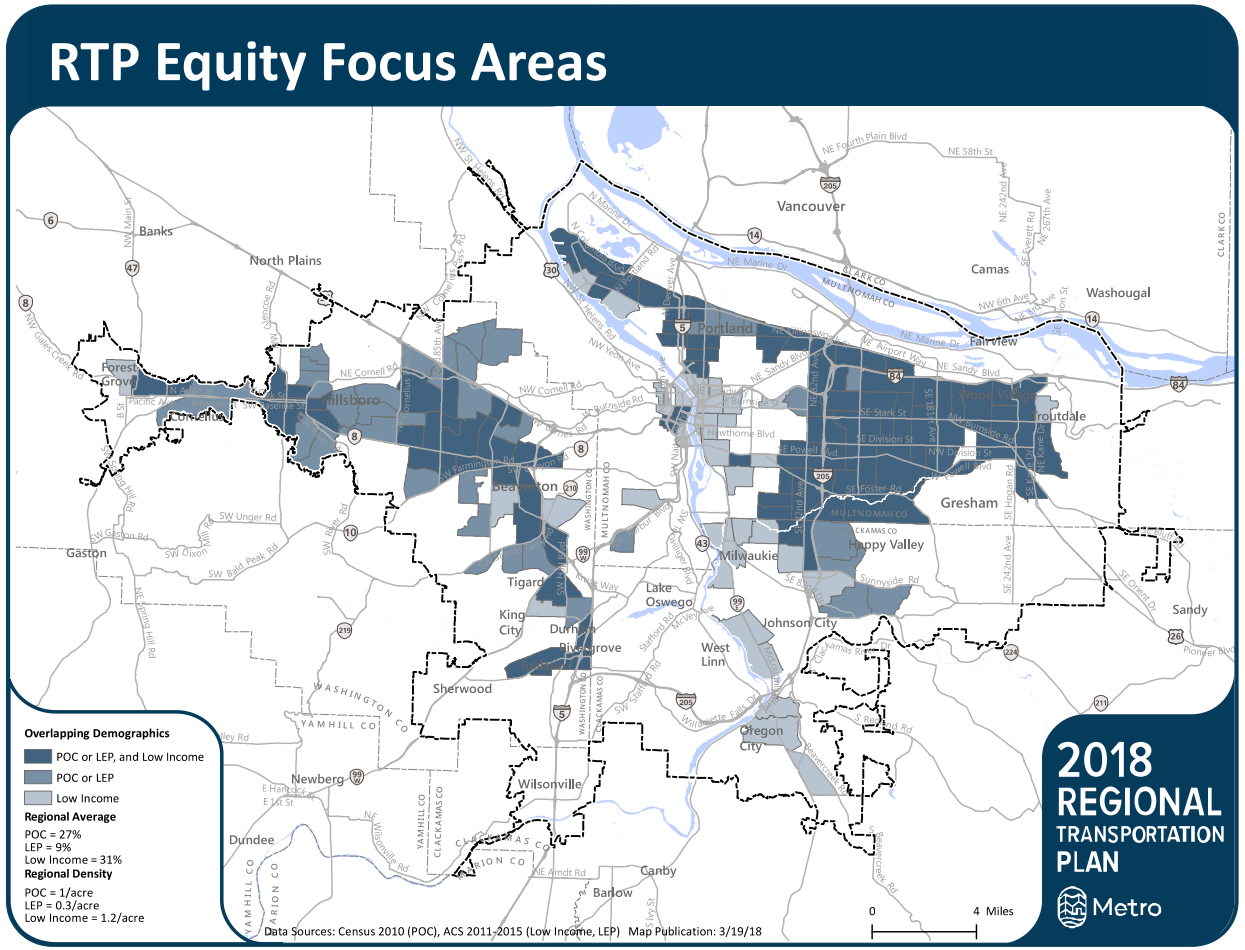
Evaluating transportation investments for **equity benefits and impacts**

Engaging and addressing the needs of marginalized communities in planning and implementation

Anticipating and minimizing displacement impacts

Source: 2018 Regional Transportation Plan (Chapter 3)

RTP Equity Analysis



Source: 2018 RTP (Chapter 3) and Appendix E (Transportation Equity Evaluation)

Analysis of priorities and disparities experienced by historically marginalized communities

Priorities identified through public engagement and technical work group:

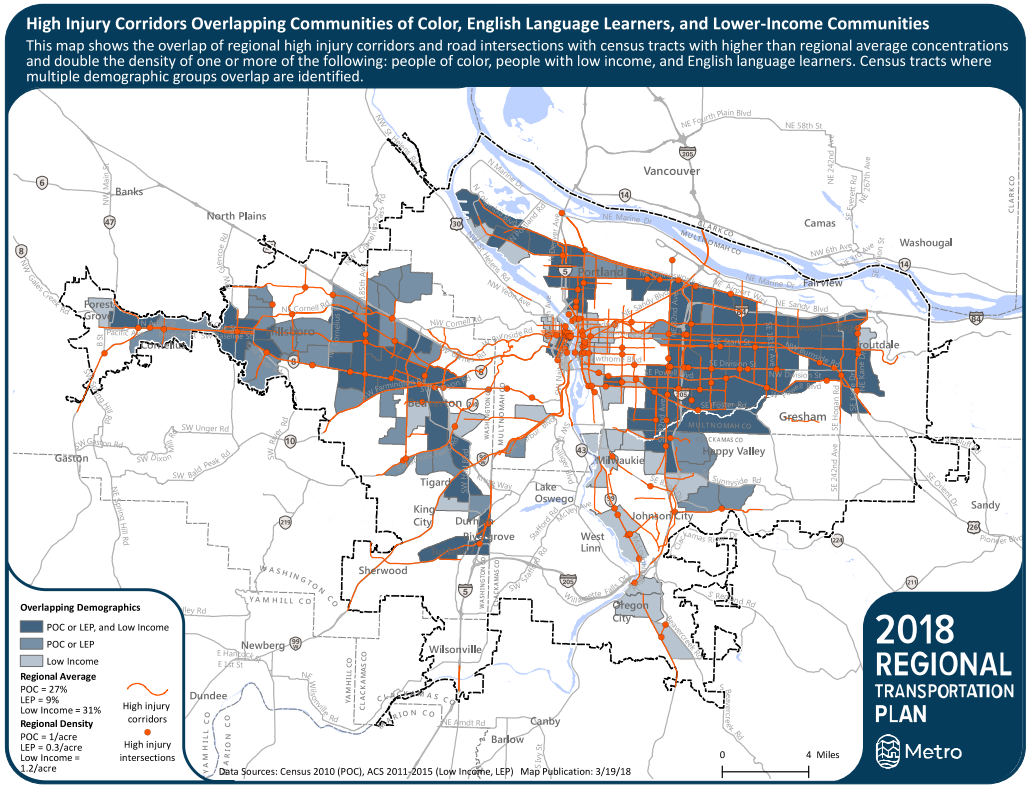
- Transportation safety
- Access to jobs, places and affordable travel options
- Public health
- Affordability
- Involuntary displacement

Safety is an equity issue

More than **60 percent of projects improve safety** and **three-quarters of those projects are located in equity focus areas** – areas with the highest incidents of crashes causing death or life-changing injuries

Average 482 deaths and serious injuries per year

60 percent of severe crashes occur on high injury network which represents 6 percent of all streets



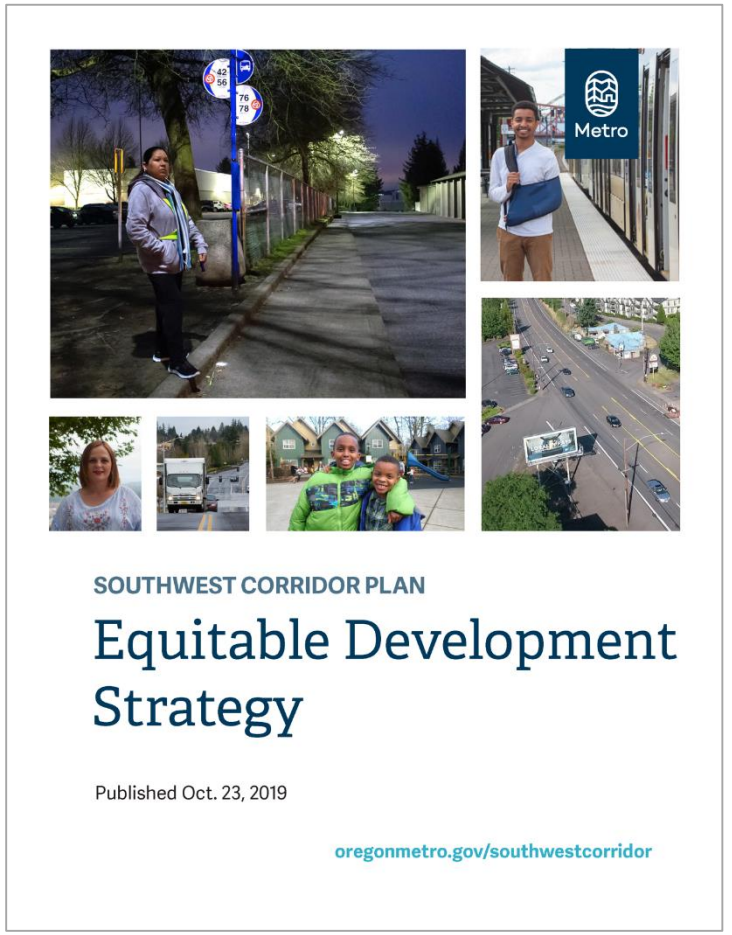
Source: 2018 RTP (Chapter 3)

Data from ODOT (2010-14)

While the number of projects improving safety is moving in the right direction, observed crash data from last five years indicates that the region is moving in the wrong direction to achieve Vision Zero target.

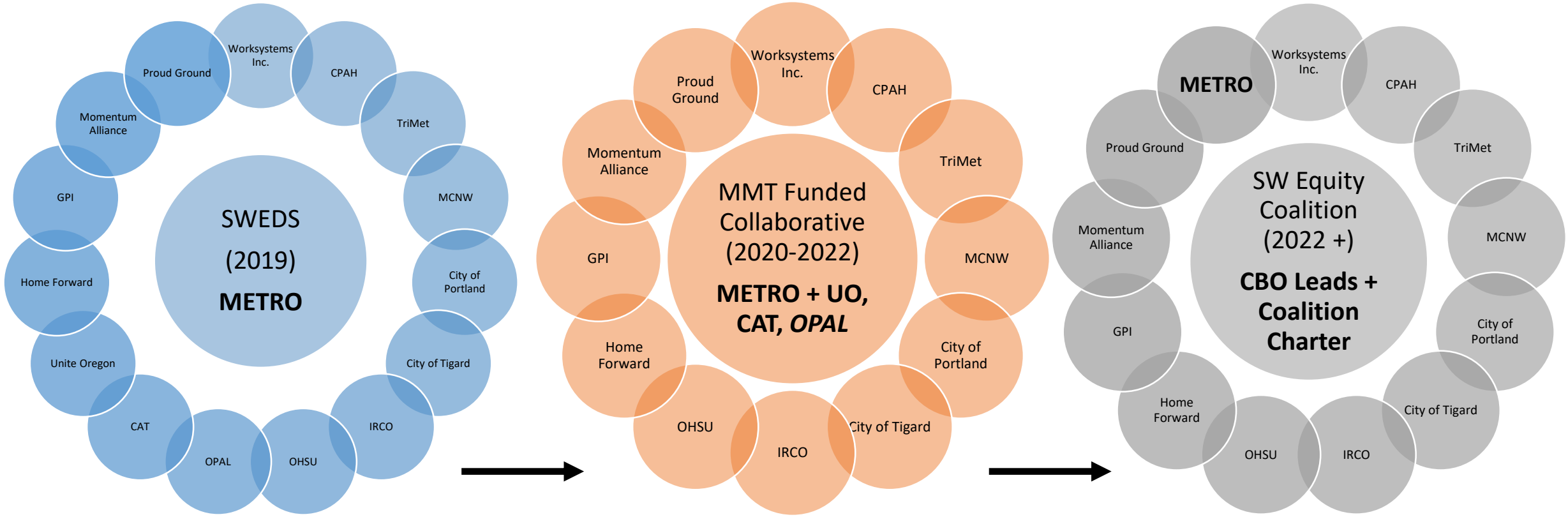
MPO Project Level - SW Corridor Equitable Development Strategy

- Expand the breadth and depth of influence among affected people
- Address residential and business displacement
- Reduce disparities and improve conditions for affected people
- Preserve and expand affordable housing
- Advance economic opportunity for all and build community capacity for wealth creation
- Promote transportation mobility and connectivity
- Develop healthy and safe communities



https://www.oregonmetro.gov/southwestcorridor

(De)Centering Of Decisions + Power



Economic Value Atlas Tool

BUSINESS	PEOPLE	PLACE
Growing Jobs	Economic Inclusion	Developability
Market Connection	Racial Inclusion	Mobility
Target Industries	Accessible Jobs	Market Activity
Accessing Workforce	Business Location	Affordability

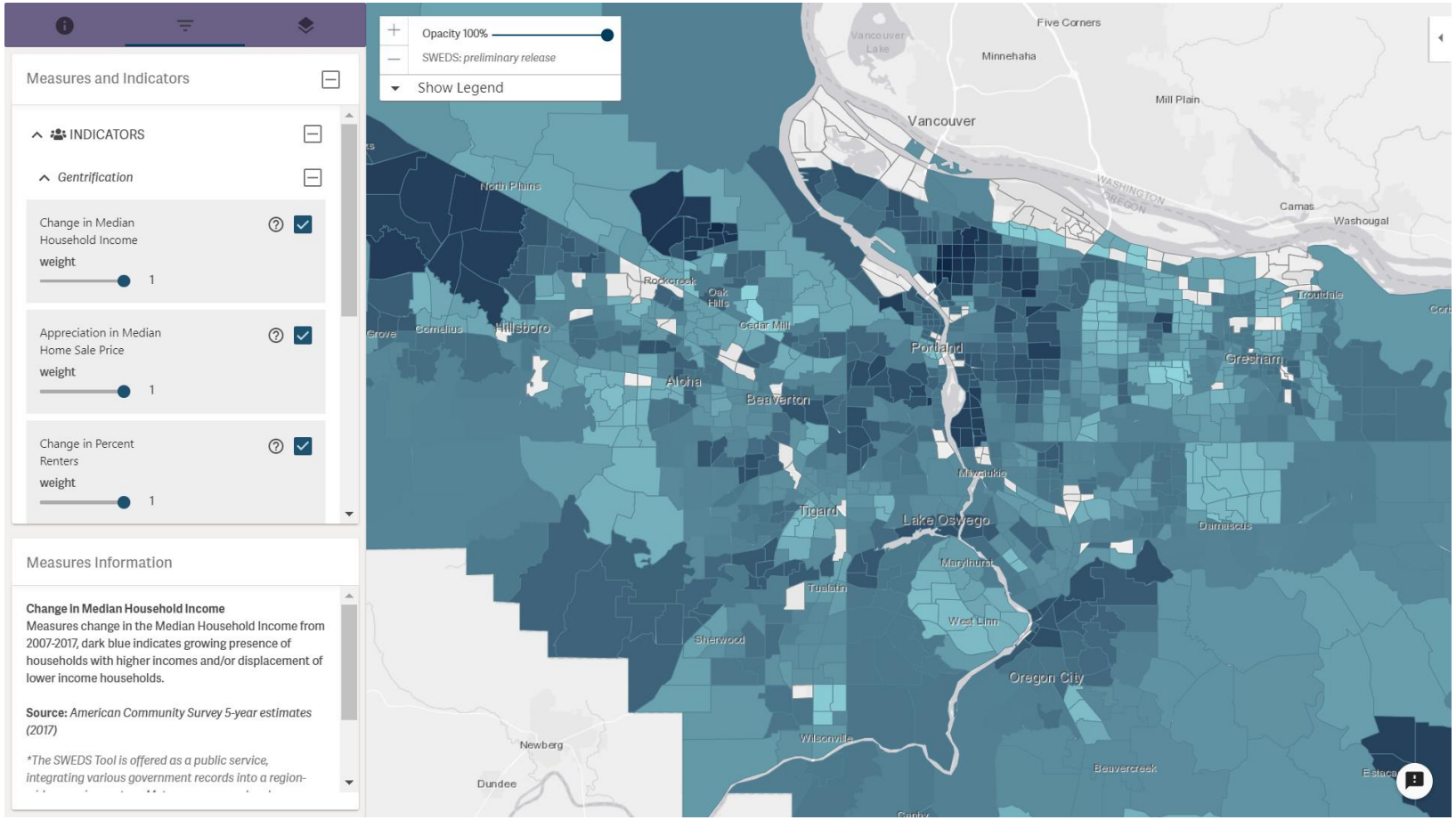
Web Link:
http://evatool.oregonmetro.gov/

Equitable Development Index Tool

- **COMMUNITY CHANGE**
  - Income + Sales price growth/decline
  - % renters/cost-burdened HH
  - % people of color
- **HOUSING AFFORDABILITY**
  - Rent + Sales Price
  - Home ownership
  - Subsidized housing/households
- **HEALTH + SAFETY**
  - % insured
  - Walkability + community services access
- **ACCESS TO OPPORTUNITY**
  - % in poverty
  - Median Income
  - Access to schools/libraries
  - Educational attainment
- **MOBILITY + CONNECTIVITY**
  - Commute times
  - Transit-dependency
  - Transit access

Web Link:
http://equitytool.oregonmetro.gov

Changing communities



rising incomes and sales prices, losing renters and people of color

Meeting a Household Self-Sufficiency Standard

Housing ($968)

Health care ($451)

Child care ($2,045)

Transport ($549)

Food ($696)

Taxes ($1,441)

Washington County Self-Sufficiency Wage

(2 Adults, 1 Infant, 1 Preschooler):

$76,258

$18.05 per hour, per adult

https://www.worksystems.org/research/self-sufficiency-standard-oregon-counties-2017

Impacted Household Data Portraits

Metro

Disability
$8,820 per year (17% AMI)

Household: 1 adult
Education: High school graduate
Tenure: Renter
Housing Costs: $350 per month w/ Section 8 voucher
Commute time: 65 minutes by transit

Meets Self Sufficiency Standard: No
At Risk for Displacement: Yes
Affordable Monthly Housing Expense: $220

Small business owners
$22,000 per year (24% AMI)

Household: 3 adults (1 grandparent), 4 children (2 school aged, 1 preschool, 1 infant)
Education: High school graduates
Tenure: Renter
Housing Costs: $1,000 per month
Commute time: 15 minutes by car

Meets Self Sufficiency Standard: No
At Risk for Displacement: Yes
Affordable Monthly Housing Expense: $550

Snapshot of households earning less than 30% of Area Median Income

Retail worker
$23,400 per year (29% AMI)

Household: 1 adult, 4 children (3 school age, 1 preschool aged)
Education: High school graduate
Tenure: Renter
Housing Costs: $750 per month
Commute time: 55 minutes by transit

Meets Self Sufficiency Standard: No
At Risk for Displacement: Yes
Affordable Monthly Housing Expense: $585

Transitioning out of homelessness
$12,500 per year (24% AMI)

Household: 1 adult
Education: High school graduate
Tenure: Renter
Housing Costs: $310 per month w/Section 8 voucher
Commute time: 60 minutes by transit

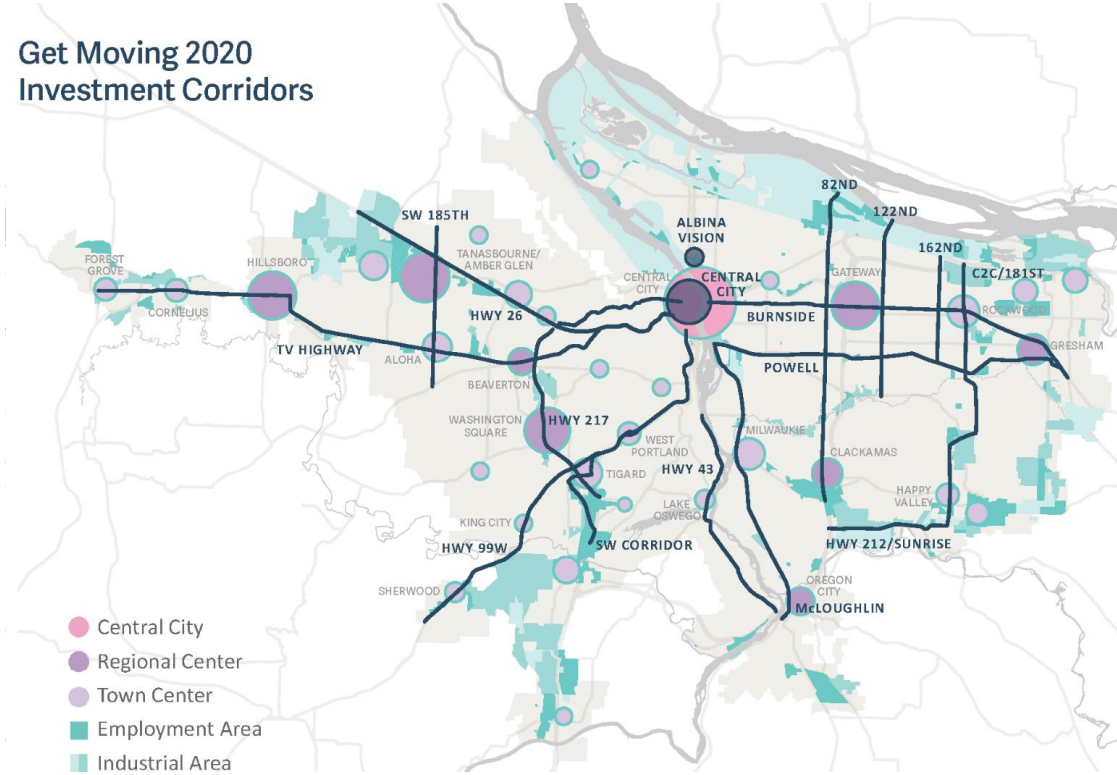
Meets Self Sufficiency Standard: No
At Risk for Displacement: Yes
Affordable Monthly Housing Expense: $310

Roadmap for Using Data to Support Equity Outcomes

- **Set equity principles based on best practices among peers**
- **Ground principles + data through meaningful engagement:** Are those most impacted given the resources to be involved in analysis and process?
- **Testimonials + qualitative information:** Does the qualitative and anecdotal evidence back up what you find in the data?
- **Connect actions to equity outcomes:** Have you collectively evaluated what actions have the most positive impacts on breakdowns for people of color, and other under-served workers/communities/clients? Indicators?
- **Test applications:** Can you test or pilot some applications and evaluate?
- **(De)centering of decisions + power:** Can you decentralize and prioritize people of color and women in making decisions on analysis + actions?

Get Moving Measure

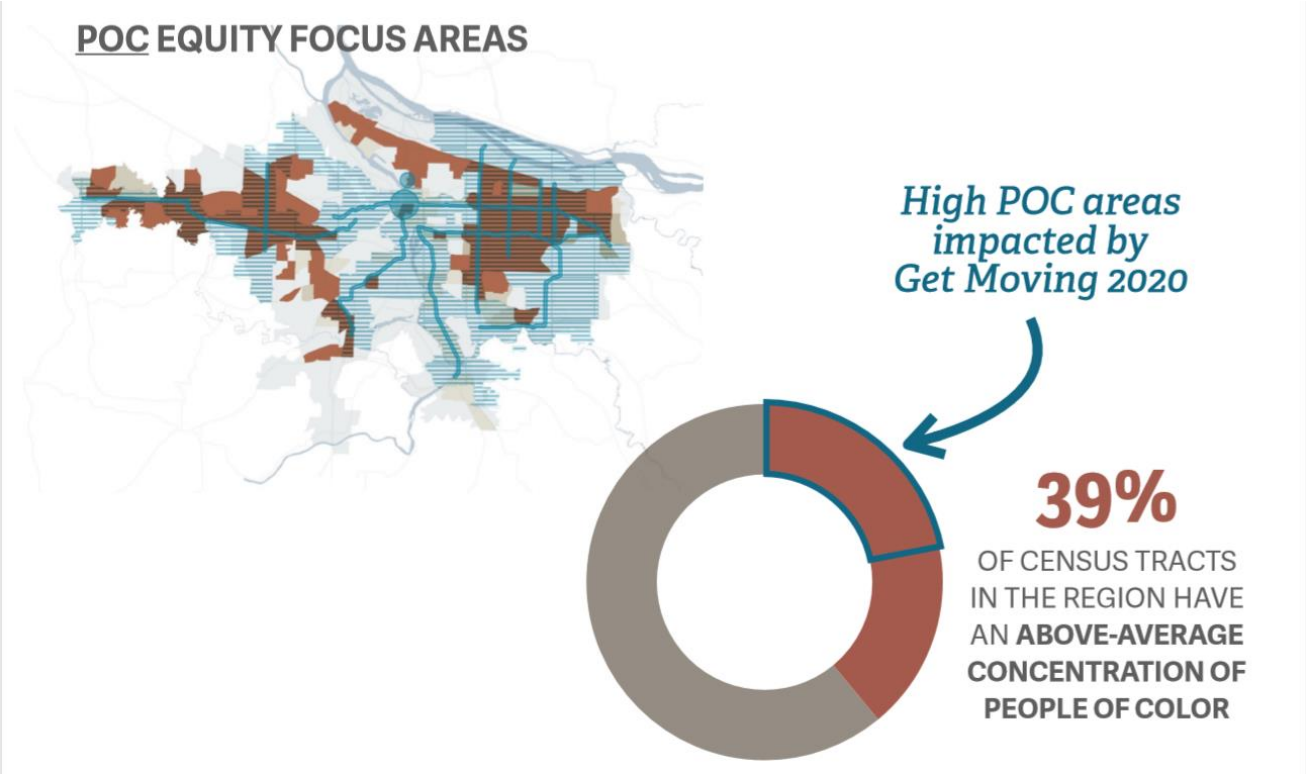
- Goals
  - Evaluate who stands to benefit
  - Understand local contexts for projects
  - Anchor community-built outcomes and equity strategies
- Approach
  - Measure-wide equity analysis
  - Corridor profiles
  - Equity outcomes and strategies

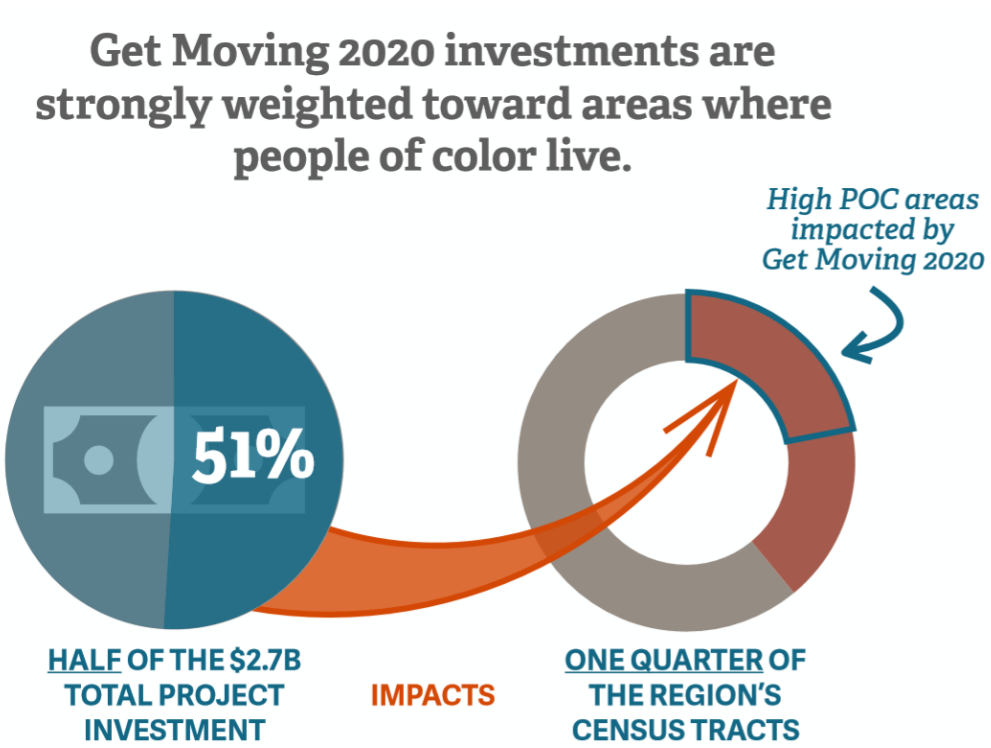


https://www.oregonmetro.gov/get-moving-2020

Equity Analysis

Were communities of color prioritized for investment?





Equity Analysis

Would communities of color benefit across investments?

Number of Safety Infrastructure Investments in Areas of High POC Concentration Impacted by Get Moving 2020

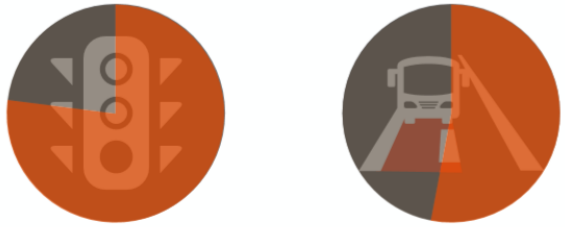
20 New sidewalk miles

190 New safe marked crossings

3800 New street lights

90 Miles of improved bikeway

Portion of Transit Investments in Areas of High POC Concentration Impacted by Get Moving 2020*



75% of Transit Signal Priority additions

50% of new bus lane miles**

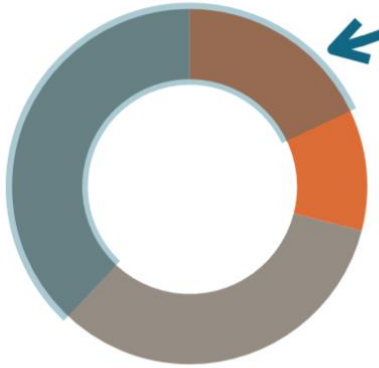
Equity Analysis

Which communities of color would benefit?

REGIONAL DEMOGRAPHIC PROFILE

1.67M
PEOPLE LIVE IN THE METRO PLANNING AREA

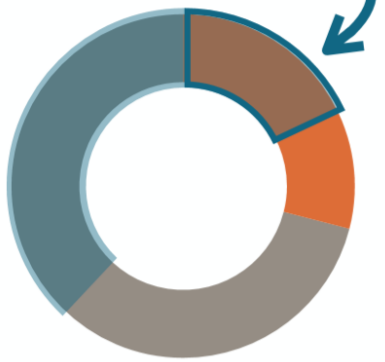
56%
OF THE REGION LIVES IN THE INVESTMENT AREA



480,000
ARE PEOPLE OF COLOR

REGIONAL DEMOGRAPHIC PROFILE

62%
OF THE REGION'S PEOPLE OF COLOR LIVE IN THE INVESTMENT AREA



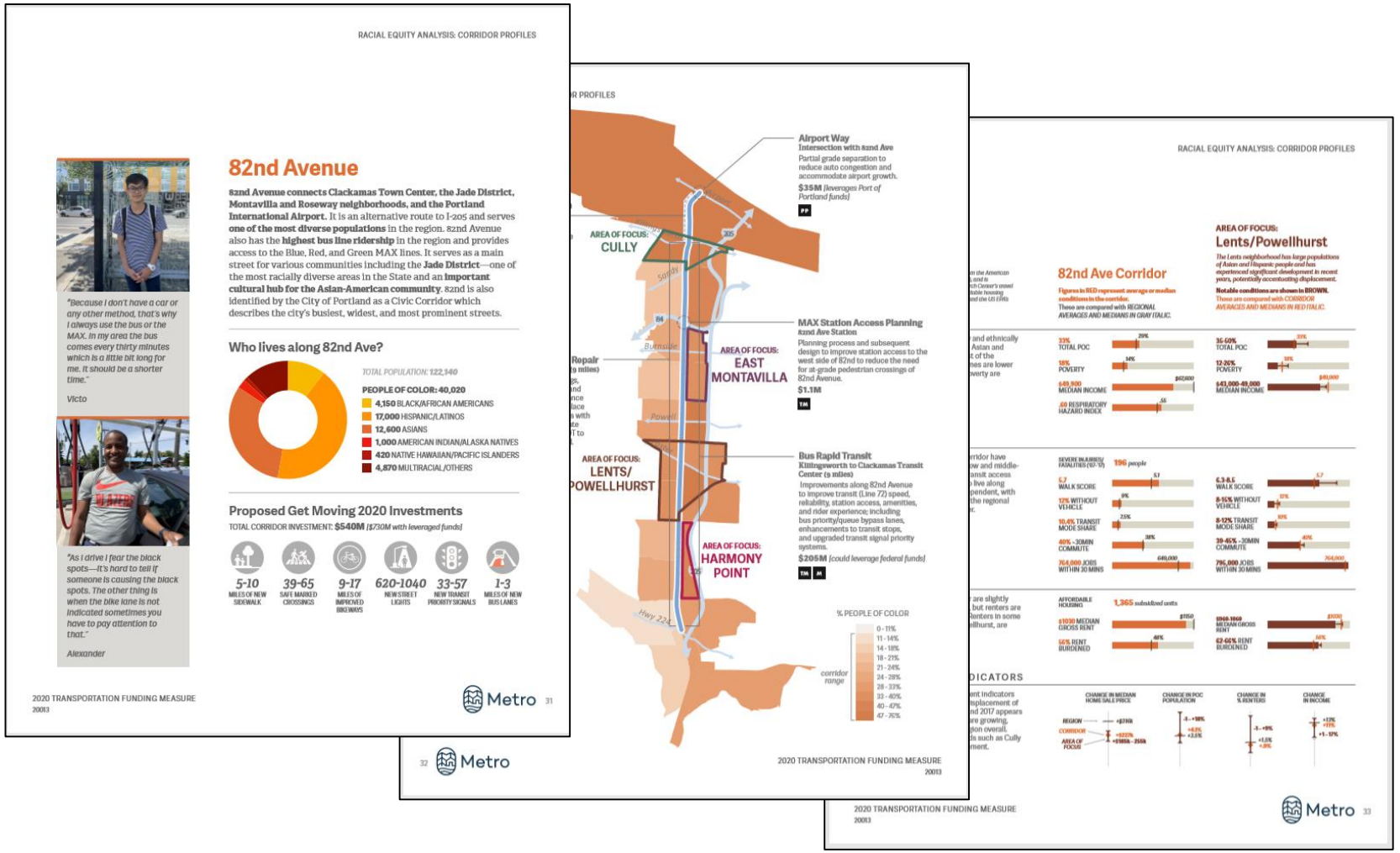
Percent of population living in investment area by race:

- **59%** OF BLACK/AFRICAN AMERICANS
- **67%** OF LATINOS
- **63%** OF AMERICAN INDIANS/ALASKA NATIVES
- **58%** OF MULTIRACIAL PEOPLE
- **58%** OF ASIANS
- **57%** OF OTHER NON-WHITES
- **65%** OF NATIVE HAWAIIAN/PACIFIC ISLANDERS

Corridor Profiles

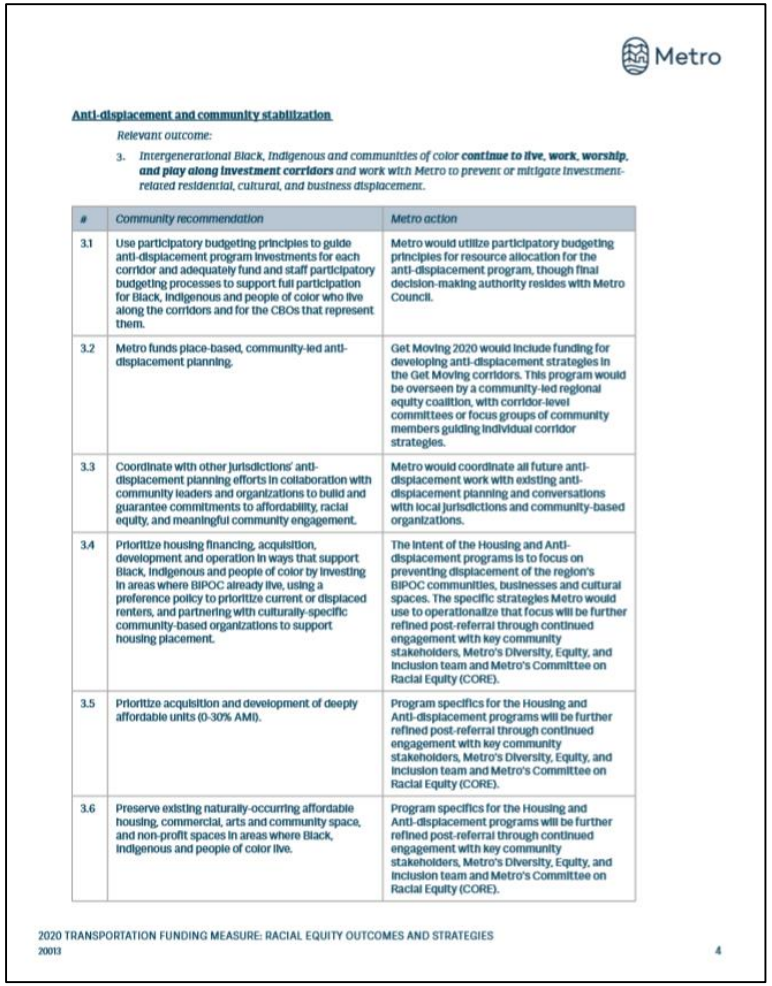
Purpose

- Ground outcomes and strategies
- Provide key economic/housing context
- Encourage place-based approach in implementation



Equity outcomes and strategies

- Outcomes
  - Facilitated conversation series about outcomes
  - Collaborative feedback process
  - Themes: Impact, Inclusion, Accountability and oversight
- Strategies
  - Crowd-sourced strategies for BIPOC community leaders
  - Directly responded to each strategy with commitments or rationale for rejection



Metro

Anti-displacement and community stabilization

Relevant outcome:

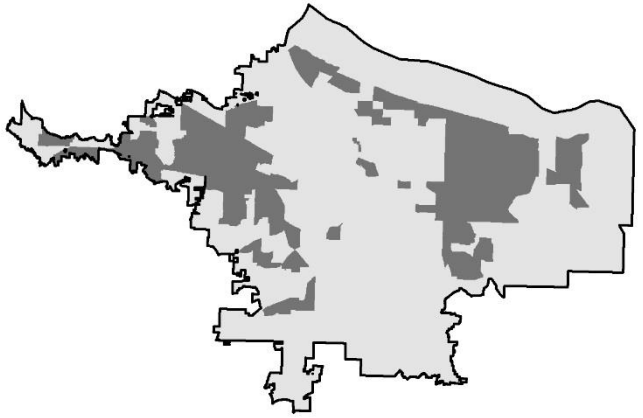
3. *Intergenerational Black, Indigenous and communities of color* ***continue to live, work, worship, and play along investment corridors*** *and work with Metro to prevent or mitigate investment-related residential, cultural, and business displacement.*

#	Community recommendation	Metro action
3.1	Use participatory budgeting principles to guide anti-displacement program investments for each corridor and adequately fund and staff participatory budgeting processes to support full participation for Black, Indigenous and people of color who live along the corridors and for the CBOs that represent them.	Metro would utilize participatory budgeting principles for resource allocation for the anti-displacement program, though final decision-making authority resides with Metro Council.
3.2	Metro funds place-based, community-led anti-displacement planning.	Get Moving 2020 would include funding for developing anti-displacement strategies in the Get Moving corridors. This program would be overseen by a community-led regional equity coalition, with corridor-level committees or focus groups of community members guiding individual corridor strategies.
3.3	Coordinate with other jurisdictions' anti-displacement planning efforts in collaboration with community leaders and organizations to build and guarantee commitments to affordability, racial equity, and meaningful community engagement.	Metro would coordinate all future anti-displacement work with existing anti-displacement planning and conversations with local jurisdictions and community-based organizations.
3.4	Prioritize housing financing, acquisition, development and operation in ways that support Black, Indigenous and people of color by investing in areas where BIPOC already live, using a preference policy to prioritize current or displaced renters, and partnering with culturally-specific community-based organizations to support housing placement.	The intent of the Housing and Anti-displacement programs is to focus on preventing displacement of the region's BIPOC communities, businesses and cultural spaces. The specific strategies Metro would use to operationalize that focus will be further refined post-referral through continued engagement with key community stakeholders, Metro's Diversity, Equity, and Inclusion team and Metro's Committee on Racial Equity (CORE).
3.5	Prioritize acquisition and development of deeply affordable units (0-30% AMI).	Program specifics for the Housing and Anti-displacement programs will be further refined post-referral through continued engagement with key community stakeholders, Metro's Diversity, Equity, and Inclusion team and Metro's Committee on Racial Equity (CORE).
3.6	Preserve existing naturally-occurring affordable housing, commercial, arts and community space, and non-profit spaces in areas where Black, Indigenous and people of color live.	Program specifics for the Housing and Anti-displacement programs will be further refined post-referral through continued engagement with key community stakeholders, Metro's Diversity, Equity, and Inclusion team and Metro's Committee on Racial Equity (CORE).

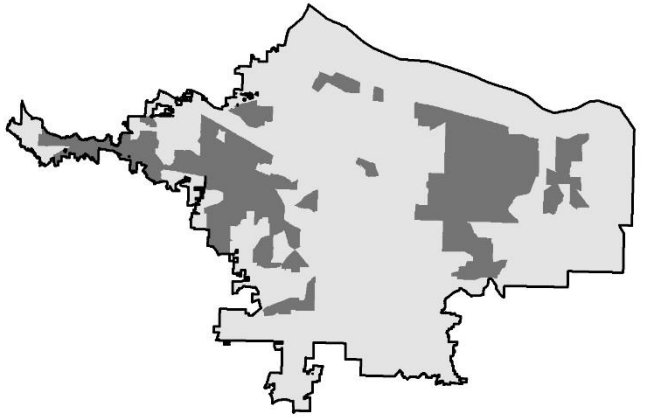
Equity Focus Areas Methods

- Identify tracts above regional rate
- Apply Boolean OR condition, whereby tracts were included if they exceeded any of three regional rates
- Apply density threshold to remove largely industrial tracts

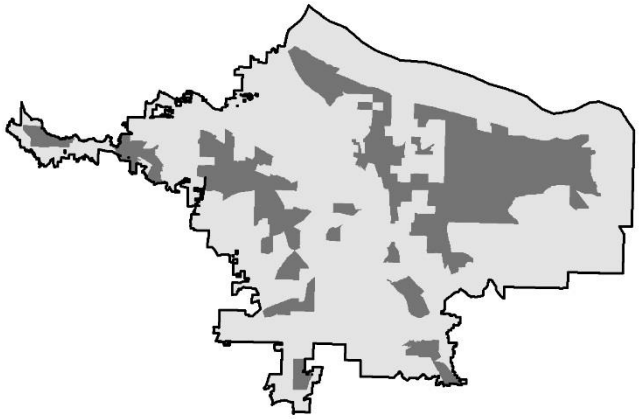
People of Color > 29%



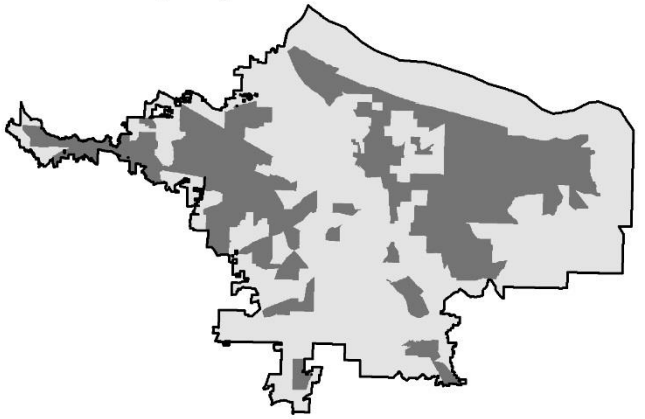
Limited English Proficiency > 8%



Low Income > 28%



Equity Focus Areas



Equity Focus Areas Pros and Cons

Pros

- Binary output
  - Easy to compare
- Simple
  - Easy to explain
- Stackable
  - Easy to see where multiple thresholds are exceeded
- Inclusive
  - Boolean OR
  - Regional rates not isolated to densest clusters

Cons

- Binary output
  - No nuance
  - Difference between EFA and non-EFA exaggerated
- Simple
  - Three variables
- Fuzzy data
  - MOEs not included
- Change-over-time
  - Easy to over-emphasize small changes

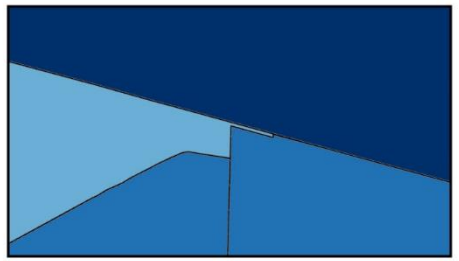
Social Vulnerability Tool

Partnership with Regional Disaster Preparedness Organization (RDPO)

Social vulnerability through lens of emergency management

Combine federal data with state and local data

Provide localized view of social vulnerability, including indices for region and each county



Federal

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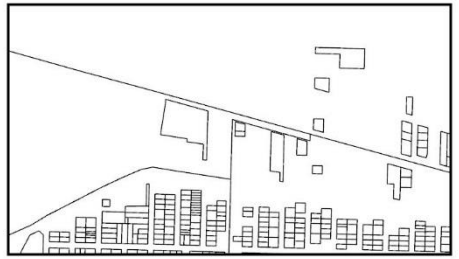

Local

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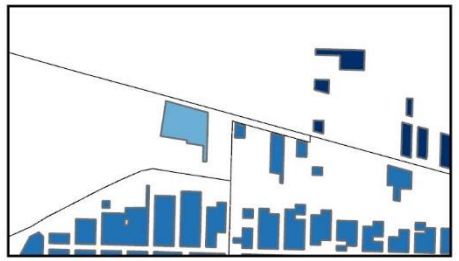

SVT

https://rdpo.net/social-vulnerability-tools-project

Contact Information

Sebrina Owens-Wilson
Regional Impact Program Manager
Diversity, Equity & Inclusion – Metro Regional Government
Sebrina.Owens-Wilson@oregonmetro.gov

Kim Ellis
Regional Transportation Plan Project Manager
Metro Regional Government
Kim.Ellis@oregonmetro.gov

Joe Gordon
Senior GIS Specialist
Metro Regional Government
Joe.Gordon@oregonmetro.gov

Jeffrey W. Raker
Senior Economic Development Planner
Metro Regional Government
Jeffrey.raker@oregonmetro.gov