



CITY OF
PORTLAND, OREGON
OFFICE OF THE CITY ATTORNEY

Tracy Reeve, City Attorney
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REPORT TO COUNCIL

DATE: June 6, 2017

TO: Portland City Council

FROM: Tracy Reeve, City Attorney
Anna Kanwit, Director of Bureau of Human Services

SUBJECT: Report on Gender Neutral Documents and Policies

On December 17, 2015, City Council adopted Resolution 37175 which instituted a policy for all-gender bathroom facilities and directed that all City bureaus examine their written policies and procedures to evaluate and, if possible, replace gender specific language. The review was to include, but not be limited to, policy documents, rules, regulations, applications, permits, and contracts.

Pursuant to the Resolution, the City Attorney's Office and the Bureau of Human Resources (BHR) worked to assist all City bureaus in their initial assessment of whether gender-specific language in bureau documents should be replaced with gender-neutral language. The City Attorney's Office and BHR developed a **Guideline for Achieving Gender Neutrality in City Policies and Documents** (attached hereto as Exhibit A). This Guideline:

1. Summarized the Resolution's requirements.
2. Identified documents for review and update.
3. Suggested methodology for document review.
4. Identified when gender specific language may be needed.

To further guide bureaus, the City Attorney's Office and BHR prepared a list of gendered search terms and suggested several approaches on how to amend documents to achieve gender neutrality, while preserving the intent of the documents reviewed.

A **Bureau Response Form** (attached hereto as Exhibit B) was distributed to all bureaus, requesting each bureau commit to timelines for document review and update, and create a policy or procedure for ensuring gender-neutral language in future documents.

On August 8, 2016, the City Attorney and Director of BHR provided the Guideline and Bureau Response Form to all bureaus. Bureaus were requested to complete and return the Bureau Response Form to the CAO by November 1, 2016.

In late August of 2016, the City Attorney's Office and BHR hosted two information sessions for bureau representatives to discuss the gender neutral policy and to share strategies to meet the requirements established by Council.

The following Bureau Response Forms (attached hereto as Exhibit C) were collected and reviewed by the City Attorney's Office.

In reviewing the comments to the Bureau Response Forms and meeting with bureau representatives and others, including the LGBTQ & Friends Affinity Group (DEEP), the City Attorney's Office and BHR identified a need for both a City standardized "style guide" on gender neutral language and for effective Citywide trainings on the purpose and policy objectives underlying the transition to gender neutral language.

For example, the Bureau of Planning and Sustainability noted in its Bureau Response Form:

"Training from BHR and/or the Auditor's office is imperative to the success of this work. We are hopeful this has been considered and will be offered within the next few months as bureaus begin to review and revise current documents. We can do all the work on current and living documents, but without an overall strategy including training, best practices and development of SOPs, this work will not be implemented broadly and consistently throughout the City."

And, the City Attorney's Office suggested:

"[T]hat it would be best to have a Citywide standard for ensuring gender-neutral language in future City policies and documents, which can be modified as needed for individual bureau use."

Government Relations noted that:

"[Compliance] date is dependent on when model city policies will be available to bureaus."

The Parks work plan includes:

"[P]rovide training and insight into project goals," "New ... policies and writing style guide created," and "Communications trained in ongoing policy..."

PBOT stated that:

"PBOT would like to take a more complete and full compliance approach to reviewing and revising our documents, so we are asking for a longer timeline in order to incorporate document updates to become both 508 ADA compliant and Civil Rights compliant."

PBOT would also like to advocate for Citywide trainings regarding the value of gender neutral language, transgender 101 information, gender neutral restroom policies information, civil rights for sexual and gender minorities, etc., as we believe that changing policies also needs to include a plan for informing and changing the culture of our workforce."

PPB made similar requests:

"Prior to the start of our internal process, we request language to be standardized by the City. This way we can move forward with our internal process in a uniform and well informed manner. Concurrently, PPB will begin with the identification of members to sit on the policy development team.

The bureau will need support to include added personnel, training and guidance from experts. Following staff development and guidance provided by the city, we would begin the internal policy development process."

Finally, members of DEEP's LGBTQ & Friends Affinity Group expressed that, while the group is delighted that Council is taking steps to support the rights of trans and gender nonconforming individuals, such steps can backfire and result in *increased* rather than *decreased* discrimination and hostile behavior without effective training for employees and technical assistance on how to move such policies forward effectively.

Accordingly, the City Attorney's Office and BHR recommend that Council consider assigning to appropriate City staff, which could include BHR, OEHR and the City's Equity managers, the responsibility of developing recommendations for additional training for City staff and for a City-wide style guide, including the proposed cost of the project if additional resources are needed, and for the appointed staff to implement the recommendations. We further recommend that Council direct the City Budget Office to identify and assist in the appropriation of sufficient funding to ensure that the important work of this policy can be successfully undertaken.

Respectfully submitted,



Tracy Reeve
City Attorney



Anna Kanwit
Director, Bureau of Human Resources

Guideline for Achieving Gender Neutrality in City Policies and Documents

Background

Resolution 37175, adopted by City Council in December 2015, requires the Bureau of Human Resources (BHR) and the City Attorney's office to work with all City bureaus to examine their policies and procedures, including but not limited to policy documents, rules and regulations, applications, permits, and contracts, to assess whether gender-specific language in the documents should be eliminated and replaced with gender-neutral language.

Bureau Action Required

By November 1, 2016, each bureau will need to have an action plan that addresses the following:

- Determine the process and timeline for review of existing documents.
- Identify existing bureau documents and underlying policies/procedures to review for gender neutrality revisions.
- Establish policy and/or timeline for reviewing future documents.
- Provide information using the attached form to City Attorney's office c/o Pat Rowen (pat.rowen@portlandoregon.gov) by November 1, 2016. Information from bureaus will be compiled and provided to City Council no later than December 17, 2016.

Documents

The following is a non-exhaustive list of existing and expected documents needing gender-neutral language assessment:

- "Historical" means documents that continue to be in effect, but were prepared in the historical sense; these documents need not be evaluated for gender neutrality.
- "Existing" means documents that are already prepared and continue to be referred to or disseminated on a regular basis.
- "Future" means documents that are to be prepared going forward.

Historical (no evaluation required)	Existing	Future
Ordinances		Ordinances
Resolutions		Resolutions
Codes		Codes
Contracts		Contracts
Reports		Reports
RFPs and other procurement documents		RFPs and other procurement documents
Correspondence (letters; memos; formal/published notes)		Correspondence (letters; memos; formal/published notes)
Bureau social media		Bureau social media
	Policy documents	Policy documents
	Administrative rules	Administrative rules
	Bureau general orders and procedures	Bureau general orders and procedures
	Employment and labor documents	Employment and labor documents
	Signs	Signs
	*Public information	Public information
	*Applications/forms	Applications/forms
	Electronic templates	Electronic templates
	Permits	Permits
	Bureau websites	Bureau websites
* Documents/brochures already printed may continue to be distributed until existing supplies are exhausted; future documents/brochures should use gender neutral language where practicable.		

Methodology

Bureaus need to make a determination of the methodology that best accomplishes the goal of assessing and implementing gender neutrality in their policies and procedures, while preserving the intent of the policy or procedure that is being reviewed.

When drafting documents, the pronoun “they” and its forms are widely accepted gender-neutral forms of identification, either when used in the place of a singular pronoun or as a plural pronoun. For example:

“An employee qualifies for benefits upon completion of their probationary period.”

or

“Employees qualify for benefits upon completion of their probationary period.”

In existing Microsoft Word documents, use the *find* and *replace* functions to identify where a document currently uses the pronouns “he” or “she” and replace those pronouns with “they.” This may be sufficient to achieve gender neutrality, provided the resulting document still expresses the City’s message clearly. If not, a deeper level of review may be needed. Rewriting the document to reflect reference to a plural subject is another method of achieving gender neutrality.

Other strategies that can be employed to incorporate gender neutrality include the following:

- Use a plural pronoun even when using a singular noun.
- Write in the plural form.
- Use identifying titles or monikers (e.g., employee, applicant, vendor, or complainant).
- Use last names or initials.
- Salutations – use identifying title and/or full name (e.g., Dear Assistant Human Resources Director or Dear David Rhys).
- Software that automatically generates salutations may need to be evaluated.

Exceptions

There may be circumstances when gender neutrality is not appropriate or gender-specific references should not be replaced after bureau review. These circumstances generally involve instances where the sex or gender of the individual is vital to the decision-making process or where programs and services are designed to be gender specific.

- Gathering of statistical data where sex or gender is germane to the study. If sex or gender is germane for statistical analysis, the choices should include male, female, other, or decline to answer.
- Situations where gender specificity is required for purposes of funding or recruitment, or as referenced in state or federal law (e.g., Minority, Women & Emerging Small Business program; gender discrimination protections).
- Procedures identified by safety bureaus involving public safety (e.g., identification of a suspect or caller, standard operating procedures where personal physical privacy may be material).
- When programs and services are designed to be gender specific to meet social equity goals. Examples include the Black Male Achievement program, WomenStrength self-defense courses, employee affinity groups, etc.
- Where context requires gender specificity for clarity (e.g., to capture an utterance of a witness).
- Dress code policies where the need for gender specificity can be articulated (e.g., safety reasons; religious accommodation).

- Medical issues where proposed course of care may depend on the individual's biological sex.

Additional Assistance

Please contact, the advice or labor and employment law attorney assigned to your bureau, or your bureau human resources business partner.

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by _____ (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by _____ (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by _____ (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by _____ (DATE).

Bureau _____
Contact person _____ Phone _____
Bureau Director Approval _____ Date _____

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by Oct 10, 2016 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by Jan 31, 2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by Mar 31, 2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by Mar 31, 2017 (DATE).

Bureau Analyst's Office
Contact person Sarah Landis Phone 3-4567
Bureau Director Approval [Signature] Date 10/11/2016

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

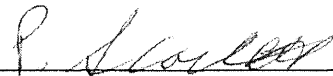
For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by February 1, 2017 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by May 1, 2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by October 1, 2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by January 1, 2017 (DATE).

Bureau: Bureau of Development Services

Contact person: Nancy Thorington Phone: (503) 823-7023

Bureau Director Approval



Date 10-31-16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by July 1, 2017 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by December 31, 2018 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by December 31, 2023 (DATE).
4. A bureau policy or procedure for Insuring gender-neutral language in future bureau policies and documents will be developed and implemented by July 1, 2017 (DATE).

Bureau of Environmental Services

Contact person Megan Callahan Phone 503-823-4759

Bureau Director Approval  Date Oct. 27, 2016

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

DRAFT—October 26, 2016

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by July 1, 2017.

BES will:

- **November 2016:** Announce the plan to the BLT and request each BLT member to designate representatives for the working group:
 - Business Services (2): Representatives from Revenue and HR/Administration/Facilities
 - Engineering Services (2): Representatives from Design and Construction Services
 - Office of the Director (2): Representatives from Communications and Environmental Policy
 - Pollution Prevention Services (3): Representatives from the Water Pollution Control Lab Pioneer Tower and 1900 Building locations
 - Watershed Services (2): Representatives from Watersheds and Stormwater System
 - Wastewater Services (1): Representative from the Columbia Blvd WTP
- **December 2016:** Establish/Convene working group with task of identifying current policies and documents from each bureau group that will need to be reviewed for gender neutrality.
- **January-March 2017:** Representatives will work with their respective groups to identify the policies and documents that will need to be reviewed for gender neutrality.
 - **Types of documents to be considered:**
 - Policy documents
 - Administrative rules
 - Bureau general orders and procedures
 - Employment and labor documents
 - Wayfinding, warning and interpretive signs
 - Public information
 - Applications/forms
 - Electronic templates
 - Permits
 - Bureau websites: Internet and Intranet
 - **Criteria for identifying documents for review. All criteria must be met.**
 - Document will continue to be in effect/active for the next 5 years. (Otherwise, document is classified as “historical” and will expire without needing revision.)
 - Document will be updated, reprinted, or revised within the next 5 years.
 - Document has a likelihood of having gender-specific language.
- **April 2017:** Working group will compile the list of current bureau policies and documents that have been identified for review.
- **May 2017:** BLT to review and approve final list of current bureau policies and documents that have been identified for review.
- **July 1:** Final list of current bureau policies and documents that have been identified for review submitted.



DRAFT—October 26, 2016

2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by December 31, 2018*.

(This is subject to change based on the final list generated as part of the identification process.)

BES will:

- **July 2017:** Designate a lead for each type of policy or document identified.
Types of documents/policies:
 - Policy documents (Environmental Policy of Director's Office lead)
 - Administrative rules (Environmental Policy of Director's Office lead)
 - Bureau general orders and procedures (Business Services lead)
 - Employment and labor documents (Business Services-HR lead)
 - Wayfinding, warning and interpretive signs (Communications lead)
 - Public information (Communications lead)
 - Applications/forms (Business Services lead)
 - Electronic templates (Communications lead)
 - Permits (Pollution Prevention lead)
 - Bureau websites (Communications lead)
- **July 2017-November 30, 2018:** Leads will designate staff to review documents identified for review from final list developed. Staff will complete reviews following the Methodology from BHR and City Attorney's Office and flag documents or current policies that will need revision. Staff will report back to leads. Leads will compile the final list of current documents and policies that will need to be revised by Nov. 30, 2018.
- **December 31, 2018:** Final list of current policies and documents that need to be revised submitted.



DRAFT—October 26, 2016

- 3. The majority of the bureau policies and documents needing gender-neutral language changes will be revised by December 31, 2023.**

BES will:

- **Beginning January 1, 2019:** BES staff will begin revising documents flagged through the gender-neutrality review outlined in the previous step WHEN the document or policy is being updated, revised or modified based on expiration or content updates.
 - Document/policy will have a publication (or posting) date after January 1, 2019.
 - Project manager for the document or policy will be provided with the current bureau policy regarding gender-neutral language to use to revise the document and bring it into compliance with bureau gender-neutral language policy.



DRAFT—October 26, 2016

4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by July 1, 2017.

BES will:

- **November 2016:** Identify a lead from Communications or Environmental Policy to research and draft a policy for gender-neutral language.
- **January 2017:** Complete research of existing policies, procedures or guidelines from other bureaus, agencies, jurisdictions or other organizations like iap2 for best practices regarding gender-neutral language.
- **March 2017:** Draft of bureau's gender-neutral language policy reviewed and approved by Communications Manager, Environmental Policy Manager and BES Assistant Director.
- **April 2017:** Draft of bureau gender-neutral language policy presented to BLT for approval.
- **May 1, 2017:** Bureau gender-neutral language policy finalized.
- **May-June 2017:**
 - Environmental Policy/Communications to lead. Presentation at BES Managers Meeting to include informational sheet on how to write gender-neutral documents and policies.
 - Business Services to lead. New gender-neutral policy to be incorporated into:
 - Employee Manual
 - New hire orientations
 - Communications to lead. Intranet page dedicated to guidelines on how to write gender-neutral documents.
 - Communications to lead. Optional brown bag session at bureau locations including Water Pollution Control Lab, Columbia Blvd Wastewater Treatment Plants and Portland Building on how to write gender-neutral documents/policies.
- **July 1, 2017:** Gender-neutral language policy goes into effect.



Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by March 30, 2017 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by May 30, 2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by June 30, 2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by January 30, 2017 (DATE).

Bureau Human Resources

Contact person David Rhys Phone X 35219

Bureau Director Approval [Signature] Date 11-1-16

Return this response to:

Pat Rowen

Office of the City Attorney

Pat.rowen@portlandoregon.gov

Ext. 3-3202

Additional Notes:

- BHR has already reviewed and revised the HR Administrative Rules.
- Labor Contracts will be reviewed and revised at the time successor agreements are negotiated. Portland Police Association Labor Contract has been updated as part of the recent negotiations as an example.

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by March 2017 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by May 2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by November 2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by August 2017 (DATE).

Bureau BIBS

Contact person Becky Chiao Phone 503 823-6124

Bureau Director Approval *Bryant Enga* Date 10/31/2016

Return this response to:

Pat Rowen

Office of the City Attorney

Pat.rowen@portlandoregon.gov

Ext. 3-3202



Bureau of Planning and Sustainability
Innovation. Collaboration. Practical Solutions.

Bureau of Planning and Sustainability

Response Information Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau of Planning and Sustainability:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by **November 1, 2016**.
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by **August 31, 2017**.
3. The majority of bureau policies and documents needing gender-neutral language changes will be revised by **December 31, 2017**.

Notes:

- We have a number of active plans posted online that are scanned PDFs. These will need to be reviewed and potentially revised, but time to find the native documents, review and revise will be more time consuming than for documents we know have original files on our shared drive.
 - We expect the recently-adopted 2035 Comprehensive Plan will be acknowledged by the state in early 2018. At that time, a review of that Plan will need to be done (which can't be started until then). Additionally, the Task 5 Early Implementation projects, Central City 2035 Plan, Zoning Code and other plans will need to be reviewed for gender-neutrality after state adoption.
4. A bureau policy or procedure for ensuring gender-neutral language in future bureau policies and documents will be developed and implemented by **June 30, 2018**. **

**** BPS Leadership and the project work group feel that Citywide (and bureau-internal) policies and procedures must be part of the process that we're starting now. However, there is not time or funding allocated to this work.**

The work group plans to make an announcement at an upcoming All Staff meeting about the Resolution and delving into the project, but developing actual policies and procedures is a full next step that needs dedicated staff time and support to achieve.

Training from BHR and/or the Auditor's office is imperative to the success of this work. We are hopeful this has been considered and will be offered within the next few months as bureaus begin to review and revise current documents. We can do all the work on current and living documents, but without an overall strategy including training, best practices and development of SOPs, this work will not be implemented broadly and consistently throughout the City.

Bureau: Planning and Sustainability

Contact person: Julie Ocken

Phone: 503-823-6041

Bureau Director Approval:

A handwritten signature in black ink that reads "Susan Anderson". The signature is fluid and cursive, with the first name "Susan" being more prominent than the last name "Anderson".

Date: October 26, 2016

Return this response to:

Pat Rowen

Office of the City Attorney

Pat.rowen@portlandoregon.gov

Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 11/1/17 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 3/1/17 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 4/1/17 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 2/1/17 (DATE).

Bureau BTS
Contact person Elonda Binstel Phone 3-4368
Bureau Director Approval [Signature] Date 10-31-16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by December 31, 2016 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by August 31, 2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by September 30, 2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by December 31, 2017 (DATE).

Bureau City Budget Office
Contact person Sarah Diffenderfer Phone x 3-6925
Bureau Director Approval [Signature] Date 9/7/16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 1/15/17 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 2/27/17 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 3/13/17 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 3/13/17* (DATE).

Bureau City Attorney's Office
Contact person Linda Law, Judy Prosper, Linh Vu Phone 503-823-4047

Bureau Director Approval  Date 10/31/16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

* The City Attorney's Office suggests that it would be best to have a Citywide standard for ensuring gender-neutral language in future City policies and documents, which can be modified as needed for individual bureau use.


Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. We would like to flag the delicate nature of the proposal passed in this resolution and the potential for it to negatively affect the people it is supposed to protect if it is introduced across the board at bureaus without proper training and guidelines.
2. We request language and notification be standardized by the City for internal and external documents prior to the development of bureau policy, aka a City Style Guide.
3. If Council prefers that the bureaus develop standard language for the City, a task force representative of bureaus would be a welcome mechanism for this work in advance of bureau policy development.
4. The bureau will need support to include added personnel, training, and guidance from experts.
5. The bureau requests that a process for parallel review of documents for LEP, HIPAA, and ADA requirements and any other Council planned proposals for change be strategically aligned with this process.
6. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by the end of two years after receipt of the resources/supports requested above. This timeframe is extensive in order to adequately train personnel on social/equity imperative behind this resolution.
7. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by the end of six months after policy or procedure is in place.
8. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by the end of one year after the identification of policies and documents to be reviewed.
9. The majority of bureau policies and documents needing gender neutral language changes will be revised and begin the appropriate review process by the end of one year after the completion of the review of bureau policies and documents.

Bureau Portland Fire & Rescue
Contact person Caryn Brooks Phone 503-823-3714
Bureau Director Approval  Date 10/25/16

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by November 1, 2016.
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by January 8, 2017.
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by March 1, 2017.
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by March 1, 2017.

Bureau: Fire and Police Disability and Retirement
Contact person: Kathy Kakesako Phone: (503) 823-5495

Bureau Director Approval  Date 8-23-16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 10/31/2016 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 11/30/2016 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 1/1/2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 10/31/2016 (DATE).

Bureau Bureau of Emergency Management
Contact person Daire Elliott Phone 3-4375
Bureau Director Approval Come 6/18 Date _____

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 1/1/2017 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 1/1/2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 1/1/2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 1/1/2017 (DATE).

Bureau OFFICE OF COMM. SALTZMAN
Contact person STACY BREWSTER Phone 3-451
Bureau Director Approval Brendan Fian BR Date 10/31/2016

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 6/30/17 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 6/30/17 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 9/30/17 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 9/30/17 (DATE).

*Date is dependent on when model city policies will be available to bureaus.

Bureau Government Relations

Contact person Larry Pfaffli Phone 3-3010

Bureau Director Approval [Signature] Date 11/1/16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by November 30 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by March 31* (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by June 30* (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by March 31 (DATE).

Bureau OMF - CAO's Office (OMF bureaus - BHR, BIBS, BRFS, BTS - are responding independantly.)

Contact person Kelly Ball Phone 503-823-6806

Bureau Director Approval [Signature] Date 10/28/16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

* Includes OMF-CAO's Office documents except EBS training documents.
EBS is planning to revise all of their training using a new tool, which is being procured.
EBS will have a workplan with expected deadlines by March 31.

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 1/1/17 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 3/1/17 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 3/1/17 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by _____ (DATE).

Bureau ONI
Contact person MARY SCHNEIDER Phone xt. 36033
Bureau Director Approval [Signature] Date 11-1-16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

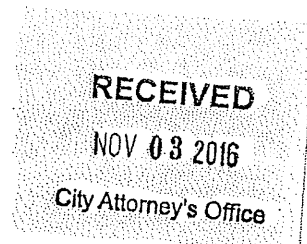
For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 02/01/2017.
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 04/01/2017.
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 06/01/2017.
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 06/01/2017.

Bureau PORTLAND PARKS & RECREATION
Contact person ART HENDRICKS Phone 503.823.5247
Bureau Director Approval [Signature] Date 11.1.16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202



Project Work Plan Template

Goal 1: Respond to Attorneys Office					
Key Action Steps	Timeline	Expected Outcome	Data Source and Evaluation Methodology	Person/Area Responsible	Comments
Meet with Communications	Complete by 10/31	Develop Action Plan	Attorneys letter of request Analyze Web Content Organizational structure	Kaki Marshall Art Hendricks Jen Yocom	Complete 1 hr
Present letter of response to attorneys office	Nov 1	Obtain/develop policy for revisions	Lit Review Policy Analysis Recommendation	SMT/Attorneys Office /OEHR	ART Submitted for review 1 Hr
Goal 2: Identify/Review all Docs					
Key Action Steps	Timeline	Expected Outcome	Data Source and Evaluation Methodology	Person/Area Responsible	Comments
Review online Policies and Web Content Flag changes to be made	Nov 1-10	On line web content and policies flagged for revision	WEB, Electronic document search and editing tool, and two tiered review process	Kaki Marshall/ Jen Yokum	½ way complete 3 Hrs
Present revised documents to division heads to provide training and insight into project goals and identify additional docs within Division for review.	Nov 5--25	Division Managers trained on resolution application, Managers able to provide additional documents from division for review.	1x1 training by act of reviewing changes of policies.	Kaki Marshall	40 hours
Review all documents from each Division to flag revisions	Nov 25- Feb 1	Completion of all documents ready for revision completed and ready for editing	WEB, Electronic document search and editing tool, and two tiered review process conducted by personnel	Kaki Marshall	
Goal 3: Complete revision of all Bureau Documents Finalize internal Policies to insure on going Compliance					
Key Action Steps	Timeline	Expected Outcome	Data Source and Evaluation Methodology	Person/Area Responsible	Comments
Finalize Writing Style Doc and internal policies for ongoing compliance	Feb 1-April 1	New PP7R Policies and writing style guide created	Lit review Best Practices	Kaki/Art / Jen Yokum / SMT	P Bot has existing policy we can work from Kaki 2 hours
Deliver flagged content to communications for revisions and publication	April 1 – June 1	Communications trained in on going policy & PPR compliant with resolution		Kaki /Yokum/ Art	15 Hours for Jens Team???

Check List of Bureau Wide Progress

Division Manager Name	E mail Address	Training Meeting Date	Documents Collected and Reviewed / Presented to Communications for Approval and Editing Date	Ongoing Compliance Policy Completed Date
Jennifer Yokum				
Margaret Evans				
Zelain				
Galina Burley				
Jeff Shafer				
Art Hendricks				
Eileen Argentina				
Terri davis				
Soo Pak				
Durelle Singelton				
Maximo Behrens				
John Zoller				
E.C. Mueller				
James Allison				
Andre Ashley				
Rachel Felice				
Jeff Milkes				
Jennifer Cairo				
Casey Jogerst				
Larry Maginnis				
Angie DiSalvo				
Kia Selley				
Josh Green				
Chris Silkie				
BrettHorner				
Dale Cook				
Lauren Mcguire				

It is likely that one single policy contained in writing style policy doc will be adequate to address all of the above individuals

It is likely that a statement on line with regard to the policy and an identified point of contact to administer compliance will be necessary in order to address the issue of compliance with all current signage that exists throughout the city.



PORTLAND BUREAU OF TRANSPORTATION

1120 SW Fifth Avenue, Suite 800 Portland, OR 97204 503.823.5185
Fax 503.823.7576 TTY 503.823.6868 www.portlandoregon.gov/transportation

Steve Novick Commissioner Leah Treat Director

Bureau Response Information - PBOT

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by 06/01/2017 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by 12/01/2017 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by 06/01/2018 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by 06/01/2018 (DATE).

Bureau PBOT
Contact person Zan Gibbs Phone 503-823-7371
Bureau Director Approval Leah Treat Date 11/01/16

PBOT would like to take a more complete and full compliance approach to reviewing and revising our documents, so we are asking for a longer timeline in order to incorporate document updates to become both 508 ADA compliant and Civil Rights compliant.

PBOT would also like to advocate for Citywide trainings regarding the value of gender neutral language, transgender 101 information, gender neutral restroom policies information, civil rights for sexual and gender minorities, etc., as we believe that changing policies also needs to include a plan for informing and changing the culture of our workforce.



The Portland Bureau of Transportation fully complies with Title VI of the Civil Rights Act of 1964, the ADA Title II, and related statutes and regulations in all programs and activities. For accommodations, complaints and information, call (503) 823-5185, City TTY (503) 823-6868, or use Oregon Relay Service: 711.

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by October 31, 2016.
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by August 30, 2017.
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by December 31, 2017.
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by December 31, 2017.

Bureau: Portland Development Commission

Contact person: Justin Douglas Phone: 503.823.4579

Bureau Director Approval  Date 10.13.16

Return this response to:

Pat Rowen

Office of the City Attorney

Pat.rowen@portlandoregon.gov

Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.


For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by December 1, 2016.
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by December 31, 2016.
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by January 31, 2017.
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by January 31, 2017.

Bureau: Portland Housing Bureau

Contact person: Leslie Goodlow Phone: 503-823-4160

Bureau Director Approval

 Date 10/31/2016
Kurt Crager

Return this response to:

Pat Rowen

Office of the City Attorney

Pat.rowen@portlandoregon.gov

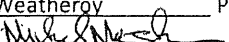
Ext. 3-3202

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the information below will serve as our bureau's timeline submission, for the deadline of November 1, 2016.

Portland Police Bureau Response/Timeline:

1. Prior to the start of our internal process, we request language be standardized by the City. This way we can move forward with our internal process in a uniform and well informed manner. Concurrently, PPB will begin with the identification of members to sit on the policy development team.
2. If Council prefers that the bureaus develop standard language for the City, a task force representative of bureaus would be a welcome mechanism for this work in advance of bureau policy development.
3. The bureau will need support to include added personnel, training, and guidance from experts. Following staff development and guidance provided by the city, we would begin the internal policy development process.
4. The bureau requests that a process for parallel review of documents for LEP requirements and any other Council planned proposals for change be strategically aligned with this process.
5. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by the end of two years after receipt of the resources/supports requested above. This timeframe is extensive because of the ongoing policy and directive review process under way at the bureau. Policy and directive reviews required by the Department of Justice Settlement Agreement with the City of Portland are primary.
6. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by the end of six months after policy or procedure is in place.
7. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by the end of one year after the identification of policies and documents to be reviewed.
8. The majority of bureau policies and documents needing gender neutral language changes will be revised and begin the appropriate review process by the end of one year after the completion of the review of bureau policies and documents.
9. Documents in languages other than English will not be included in our review because of the linguistic complications and confusions inherent in neutralizing other languages.
10. Documents produced by other organizations will not be included in our review because we have no authority to change those documents.

Bureau _____ Police _____
Contact person Elle Weatheroy Phone 503-823-0264
Bureau Director Approval  Date 4/1/16

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by **February 1, 2017**.
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by **April 1, 2017**.
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by **June 1, 2017**.
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by **September 1, 2017**.

Bureau: Water

Contact person: Gabriel Solmer, Deputy Director

Phone: 503 823-6926

Bureau Director Approval



Date 11/1/16

Return this response to:

Pat Rowen

Office of the City Attorney

Pat.rowen@portlandoregon.gov

Ext. 3-3202

Bureau Response Information

Gender-Neutral Language in City Policies and Documents

In response to Council Resolution 37175, adopted by City Council in December 2015, the following information is requested by November 1, 2016. Completed forms will be compiled and provide to City Council before December 17, 2016.

For the Bureau or Office listed below:

1. Bureau current policies and documents to be reviewed for gender neutrality will be identified within the bureau by October 1, 2016 (DATE).
2. The majority of current bureau policies and documents to be reviewed for gender neutrality will be reviewed by December 31, 2016 (DATE).
3. The majority of bureau policies and documents needing gender neutral language changes will be revised by March 31, 2017 (DATE).
4. A bureau policy or procedure for insuring gender-neutral language in future bureau policies and documents will be developed and implemented by March 31, 2017 (DATE).

Bureau Personnel & Financial Services
Contact person Ken Rysst Phone 823-6953
Bureau Director Approval [Signature] Date Oct 2, 2016

Return this response to:

Pat Rowen
Office of the City Attorney
Pat.rowen@portlandoregon.gov
Ext. 3-3202

Agenda No.
REPORT
 Title

Accept report on Gender Neutral Documents and Policies (Report)

INTRODUCED BY Commissioner/Auditor: Mayor Ted Wheeler	CLERK USE: DATE FILED <u>JUN 13 2017</u>
COMMISSIONER APPROVAL Mayor—Finance & Administration - Wheeler <i>W</i> Position 1/Utilities - Fritz Position 2/Works - Fish Position 3/Affairs - Saltzman Position 4/Safety - Eudaly	Mary Hull Caballero Auditor of the City of Portland By: <i>[Signature]</i> Deputy
BUREAU APPROVAL Bureau: Office of the City Attorney Bureau Head: Tracy Reeve	ACTION TAKEN: JUN 21 2017 ACCEPTED
Prepared by: Tracy Reeve <i>TR</i> Date Prepared: 6/6/17	
Impact Statement Completed <input checked="" type="checkbox"/> Amends Budget <input type="checkbox"/>	
City Auditor Office Approval: required for Code Ordinances	
City Attorney Approval: required for contract, code, easement, franchise, charter, Comp Plan <i>TR</i>	
Council Meeting Date	

AGENDA	FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:	
TIME CERTAIN Start time: _____ Total amount of time needed: _____ (for presentation, testimony and discussion)		YEAS	NAYS
CONSENT <input type="checkbox"/>	1. Fritz	1. Fritz	<input checked="" type="checkbox"/>
REGULAR <input checked="" type="checkbox"/>	2. Fish	2. Fish	<input checked="" type="checkbox"/>
Total amount of time needed: <u>15</u> <i>MW</i> (for presentation, testimony and discussion)	3. Saltzman	3. Saltzman	<input checked="" type="checkbox"/>
	4. Eudaly	4. Eudaly	<input checked="" type="checkbox"/>
	Wheeler	Wheeler	<input checked="" type="checkbox"/>