# Citywide Practices: Equity Project Workplan
*(Approved by City Leadership Team - 07.16.2024;*
*updated 08.21.2024 to include stakeholder engagement plan)*

## PROJECT PARTICIPANTS

Project Team:
- Jennifer Chang, Transition Team – project manager
- Jamey Duhamel, Transition Team – project support
- Autumn Carter, NEX Strategies - consultant
- Ben Duncan, Kearns & West - consultant
- City Leadership Team (City Administrator, Assistant City Administrator, Deputy City Administrators) – steering committee and project sponsor

Partners in the project include subject matter experts (SME) and other stakeholder groups outlined in the project's Stakeholder Engagement Plan on page 3.

The goal of the project is to prepare City Leadership and the organization for the new role of the Equity Officer. The project will provide members of the city's leadership team with analysis of current internal practices and external concerns, research-based best practices, and recommendations to inform their decision-making on the hiring of the Equity Officer and priorities for the position and equity practice.

## SCOPE OF PROJECT

The project will involve three phases:

- **Phase 1: Research -** Gather and review information related to existing legal obligations and strategic goals, definitions of equity practice, employee practitioner roles, guidelines, policies, operations; conduct environmental scan of best practices in organizational structure and practices for advancing equity work. The project team will develop and manage the research plan.

- **Phase 2: Stakeholder Engagement -** Consult and engage with subject matter experts and other stakeholders for their opinions and feedback on:

  - ✓ Equity Officer position roles and responsibilities, lines of authority, span of control, and relationship to internal and external partners
  - ✓ Equity Officer recruitment process and timeline
  - ✓ Current state of equity practices (e.g. identify roles, structures, processes)
  - ✓ Desired outcomes for the equity practice in the future.

- **Phase 3: Analysis and Recommendations –** The project team will analyze information from the research and engagement phases to produce a report with analysis and recommendations. It will include a risks assessment, proposed strategies, and conditions to support the staff and organization through change.

**Out of Scope:** To advance and institutionalize the equity practice citywide, this project will provide analysis and recommendations to City Leadership Team to inform their decision-making. Deliberations about effectiveness of current staff roles, capacity, or distribution of resources across the city is out of scope for the project. Additionally, managing the Equity Officer recruitment process is out of this project's scope.

## DELIVERABLES

The project will produce a final report with the following anticipated deliverables:

- Current State Review and Environmental Scan (existing system, staffing, operating norms, and practices; strengths, gaps/needs; best practices)
- Considerations for the Future State
- Recommendations:
  - Equity Officer Key Roles and Responsibilities, including authority, span of control, collaborations and relationships with other leadership and practitioners, on-boarding, and support to transition into the new role.
  - Equity Officer recruitment process and timeline.
  - Organizational needs the Equity Officer may consider prioritizing.
  - Potential actions, structures, resources, and options to lay foundation for success for the equity practice (e.g. core equity team, transition support).

The report will be submitted to City Leadership Team for their review and deliberations as they make decisions about next steps, including the hiring of the Equity Officer.

## PHASES AND TIMELINE

| Dates | Description |
|---|---|
| By July 30 | Project workplan approved |
| July 1 to mid-September | Phase 1: Research |
| Mid-July to late-October | Phase 2: Stakeholder engagement |
| October 1-30 | Phase 3: Analysis |
| Late-October | Draft report completed |
| Late-October to mid-November | Stakeholder review of draft |
| Late-November | Report finalized and sent to City Leadership |
| December and ongoing | Leadership deliberations and decisions, including officer recruitment |
| By December 31 | Officer job description finalized (depending on City Leadership decision) |

## STAKEHOLDER ENGAGEMENT PLAN

<u>Objectives:</u>

The objectives of the stakeholder engagement plan for the project are to:

1. Identify potential roles, responsibilities, and levels of authority for the Equity Officer position that may align with organizational and community needs.
2. Define the current state of the practice of equity at the City of Portland.

To avoid engagement fatigue, the team plans to review and use applicable and available data/reports from prior engagement and reviews to inform this process.

<u>Roles in stakeholder engagement:</u>

- Facilitators: Equity project team members: Jennifer Chang, Jamey Duhamel, Autumn Carter, Ben Duncan

- Stakeholders: The project will use various channels to engage several groups, including those with subject matter expertise (SME) in equity and other technical areas. As people are available and interested in participating, these may include the following, among others:

  <u>Employee groups - internal to City:</u>
  - Office of Equity and Human Rights
  - Equity managers
  - Citywide Equity and Civil Rights managers (Civil Rights and Racial Equity, Language Access and Language Equity, and ADA and Disability Equity)
  - Other equity practitioners (as identified by equity managers and directors)
  - Tribal Relations
  - LGBTQIA2S+ Equity Program
  - Bureau equity councils/committees
  - DEEP employee resource groups
  - Bureau directors

  <u>Community groups:</u>
  - Government Transition Advisory Committee (GTAC)
  - National equity and governance focused organizations
  - Culturally specific agencies
  - LGBTQIA2S+ organizations
  - Civil Rights and Racial Equity organizations
  - Language Access and Language Equity organizations
  - ADA and Disability Equity organizations
  - District coalition offices

- Decision Makers: The engagement process is intended to inform the decisions made by the City Leadership Team. The City Leadership Team also serves as the steering committee on the process and includes:
    - City Administrator Michael Jordan (hiring manager for the Equity Officer)
    - Assistant City Administrator, Annie Von Burg
    - Deputy City Administrators
        - Donnie Oliveira (Community and Economic Development)
        - Sonia Schmanski (Vibrant Communities)
        - Sara Morrissey (City Operations)
        - Priya Dhanapal (Public Works)
        - Jonas Biery (Budget and Finance)
        - Mike Myers (Public Safety)

Potential Research Questions: (project team will be refining throughout the process)

Objective 1: Officer Roles, Responsibilities, and Authority

- What priority outcomes should the City focus and make progress on for the next 3-5 years? (Provide a pre-populated list; space for write in.)
- Imagining someone entering the role of the Equity Officer for the City of Portland, how might you envision them working with others in the organization?
- What might the new Equity Officer focus on to help strengthen the organization?

Objective 2: Current State of Equity at the City

- Who are equity practitioners within the City? What are their specific roles and responsibilities? How do these roles interact?
- How is the City currently structured to address various aspects of equity, including race, gender, and accessibility?
- What do you think is working especially well? What do you think could improve?
- Can you tell us a bit about how your bureau or team specifically approaches this work? Do you do things differently from other teams? If so, in what ways does your approach differ?
- How does the City balance internal organizational needs with external community needs related to equity, and what mechanisms help maintain this balance?
- To what extent has the City established mechanisms to promote accountability for achieving more equitable outcomes within the organization and through its programs? How effective are they?

Methods of Engagement

The following methods will be used to gather feedback on the two objectives. Depending on the stakeholder group, questions will focus on gathering data to inform one, or both, of the two objectives.

- Survey: *Focusing primarily on objective 1*, a questionnaire drafted with input from equity practitioner leadership, previous data/reports from prior engagement, and similar surveys designed for the communications and engagement officer projects.
  - Employee survey: Understanding employee and team dynamics, sentiment, and perspectives on organizational culture
  - Community survey: Understanding community dynamics, sentiment, and perspectives on public desired outcomes.
- Interviews: *Focusing on both objectives 1 and 2*, individual discussions will be conducted with identified equity subject matter experts internal to the City.
- Focus groups: *Focusing on both objectives 1 and 2,* focus groups will be held with various equity subject matter experts and practitioners designed to better understand current structures related to organizational efforts to advance equity, including roles, practices, operations, resources, and structures.

<u>Process and Timeline – (June to October 2024)</u>

| Stakeholder Group | Expertise | Objectives | Engagement Method | Timeline for Engagement |
|---|---|---|---|---|
| Office of Equity and Human Rights Leadership - (Director and Deputy Director) | SME; Organizational/ Institutional Knowledge; leadership | 1 & 2 | Interviews, survey | Jul - Oct |
| Office of Equity and Human Rights (staff) | SME | 1 & 2 | Survey, focus group | Aug-Oct |
| Citywide Equity and Civil Rights managers | SME; Citywide-level/ Institutional Knowledge; leadership | 1 & 2 | Interviews, survey, focus groups | Sept - Oct |
| Equity managers | SME; Bureau-Level/ Institutional Knowledge; leadership | 1 & 2 | Interviews, survey, focus groups | Jul - Oct |
| Other equity practitioners (as identified by equity managers and directors) | SME; Bureau-Level/ Institutional Knowledge; leadership | 1 & 2 | Interviews, survey, focus groups | Jul - Oct |

| Stakeholder Group | Expertise | Objectives | Engagement Method | Timeline for Engagement |
|---|---|---|---|---|
| Tribal Relations Leadership - (Tribal Relations Manager) | SME; leadership | 1 & 2 | Interviews, survey | Aug-Oct |
| Bureau directors | Organizational/ Institutional Knowledge | 1 | Survey | Aug-Sept |
| Bureau level equity councils/committees | Organizational/ Institutional knowledge | 1 | Survey | Aug-Sept |
| DEEP, Employee Resource Groups | Organizational/ Institutional knowledge | 1 | Survey | Aug-Sept |
| ADA policy & compliance | SME; leadership | 1& 2 | Interviews, survey, focus group | July-Oct |
| Government Transition Advisory Committee (GTAC) | Community | 1 | Survey *small group discussion via GTAC meeting updates | June-Oct |
| National organizations | SME Community | 1 | Survey, interview | Aug-Sept |
| Culturally Specific Agencies | SME Community | 1 | Survey | Aug-Sept |
| Disability Community Organizations | SME Community | 1 | Survey | Aug-Sept |
| Legal and Compliance Organizations | SME Community | 1 | Survey | Aug-Sept |
| District Coalition Offices | Community | 1 | Survey | Aug-Sept |

The City Leadership Team will primarily be informed on the stakeholder engagement process through the reporting and updates of the project team.

Engagement - Proposed Timeline

- Interviews will occur from mid-July to October.
- Surveys will occur from late-August to early-October.
- Focus groups will occur from mid-September to late-October.
- Stakeholder groups review of the draft report will occur from early-November to early-December.