A. Equity Analysis

Working with your team and stakeholders, discuss and answer the following questions as a team. Make sure to allot enough time for the discussion. The following questions are designed to assist you with identifying and addressing racial, service and other disparities associated with your project/program/policy.

1. **What (if any) are the historical or current disparities related to this policy or plan? Answer the question to the best of your ability in the table below.**

A.	Have select racial/ethnic groups been inequitably impacted or denied access by this policy or plan, or similar type of project in the past?	Yes	No	Possibly
B.	Is income (or the ability to afford/pay) a determining factor in the ability to benefit from this policy or plan?	Yes	No	Possibly
C.	Is personal wealth (e.g. property or business ownership) a determining factor in the ability to benefit from this policy or plan?	Yes	No	Possibly
D.	Does the policy or plan employ regressive cost/payment structure?	Yes	No	Possibly
E.	Has policy or plan design been analyzed for cultural relevancy or versatility?	Yes	No	Possibly
F.	Have mainstream educated, middle and upper class persons historically benefitted or had 'ownership' of the topic?	Yes	No	Possibly
G.	Is participation reliant upon an individual's ability to comfortably interact with mainstream educated, middle and upper class persons, AND/OR BPS employees AND/OR their designated consultants?	Yes	No	Possibly
H.	Are there other factors that may impact access :	Yes	No	Possibly

2. **What possible disparities are known?**

3. **What possible disparities need further research and exploration?**

4. **How do you plan to find out the information that is needed to understand whether or not a disparity currently or historically exists?**

B. Stakeholder Identification and Analysis

<u>Before you begin this section:</u> Check-in with supervisor, communications, other BPS department staff for advice on identifying potential stakeholders and assessing their roles.

It is important to manage expectations of stakeholders. By completing this section you will gain clarity on what you want participants to contribute, what they will gain from taking part, and the extent to which their input can influence decision-making. <u>In Section D. you will be asked how you will confirm your initial assumptions of stakeholders. In Section H. you will have to specify resources needed to support your desired interaction with stakeholder groups</u>.

1) **Who is your primary stakeholder?**

_____

2) What is the geographic extent of your policy or plan (please check one of the following)?

___ City-wide

___ A specific geographic area; please define _____

___ Internal or agency specific; please define _____

3) If applicable, note the specific typology used to describe participants in your policy or plan (Check all that apply).

<u>Single-Dwelling Residential</u>

☐ Owner Occupied

☐ Rental

<u>Multi-Dwelling Residential</u>

☐ Owner Occupied

☐ Rental

<u>Commercial</u>

☐ Small Business

☐ Large Business

☐ Industrial

☐ Public Institutions

☐ Neighborhood

☐ Other _____

4) Stakeholder Analysis

INSTRUCTIONS:

Using the following terms, check off the appropriate boxes for each identified stakeholder group.
- **Inform:** Educate stakeholders about the rationale for the policy or plan; how it fits with BPS goals and policies; issues being considered, areas of choice or where input is needed.
- **Consult:** Gather information from stakeholders and ask for advice to better inform BPS.
- **Collaborate:** Volunteer or paid partnership to work with BPS in developing and implementing the policy or plan.
- **Shared Decision-Making:** Decision-making power, or stakeholder has a formal role in making final decisions to be acted upon.

If necessary, provide brief additional comments for each stakeholder group noting your team's assumptions on:
- how the stakeholder group might be affected, and if there are subset groups within
- how they could benefit or be harmed
- what changes they may want, or what they may want unchanged
- what general expectations they may have in regards to their interaction with BPS on this policy or plan

Considering the primary outcomes of this policy or plan (Refer to A.5.) and decisions involved, identify your stakeholders and their relationship to your work.

Use demographic data to identify population characteristics, and map if possible; attach any additional analysis to the completed worksheet. At a minimum, it is recommended to identify race/ethnicity and income characteristics. Add additional characteristic categories to the table as needed. The goal is to identify underrepresented stakeholders. Then identify strategies to address their involvement needs.

General Public

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**
General Public includes all persons who reside or work in Portland, and stay informed of BPS business generally through the media or BPS communications. Please note additional comments on this stakeholder group here:

Racial/Ethnic Groups

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**
Use Citywide or specific neighborhood demographic information to determine which specific racial/ethnic groups may be impacted by your project/program. (City of Portland Census Maps, Other Mapping Resources?) If possible, consult with other staff, affinity groups, or community members to determine if there are 'hidden' racial/ethnic groups within your impact area. Please note additional comments on this stakeholder group here:

Community and Faith Based Organizations and Neighborhood Groups

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

Community based organizations and neighborhood groups can include advocacy groups, social service agencies, neighborhood-based clubs, political organizations, and groups sponsored by the City of Portland (like Neighborhood Coalitions/Associations or the Diverse Civic Leaders Program). Some of these organizations provide services Citywide, while others serve a single population or those located only within their neighborhood. Are there community based organizations, social service agencies, or neighborhood groups that would possibly be interested in partnering/contracting on your project/program? Please note additional comments on this stakeholder group here:

Private For-Profit Business Sector

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

Would your project or program impact their revenue or customer access? In addition to businesses located within your impact area, are there businesses that would possibly be interesting in partnering/contracting on your project/program? How will you find out what their interests/concerns are? Please note additional comments on this stakeholder group here:

Local Elected Officials and Advisory Bodies

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

What is the role of the Mayor or City Council or their representatives? Will this body of work be presented to the Planning and Sustainability Commission or Mayor's staff? Is there a need to engage County or Metro elected officials as well? Please note additional comments on this stakeholder group here:

Other BPS Divisions, Work Units, or Employee Teams

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

Are there other BPS groups that have an interest or could support your project/program? What is their role, and how will you keep them engaged? Are they providing funding, staffing, or making key decisions? Can this project align with or impact the work in another Division or work unit? Please note additional comments on this stakeholder group here:

Other City or County Departments or Agencies

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

Are there other departments or agencies involved in the project/program? What is their role, and how will you keep them engaged? Are they providing funding, staffing, or making key decisions? Will this project align or impact another department's plans, projects, or programs? Please note additional comments on this stakeholder group here:

Other Public Agencies

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

Are there other public agencies involved? What is their role, and how will you keep them engaged? Are they providing funding, staffing, or making key decisions? Will this project align or impact another department's plans, projects, or programs? <u>Please note additional comments on this stakeholder group here</u>:

Other

☐ **Inform**   ☐ **Consult**   ☐ **Collaborate**   ☐ **Shared Decision-Making**

Are there other stakeholder groups not listed, i.e. disability, youth, senior, low-income, LEP communities? Who are they? <u>Please note additional comments on this stakeholder group here</u>:

C. Stakeholder Strategy

1) Noting your responses or comments to any of the above stakeholder groups, what interests and concerns should be confirmed or corroborated with them?

2) Noting your response to the previous question, how would you prioritize engagement with all of the various stakeholders you've identified?

3) What (if any) are the key decisions to be made by stakeholders, and how will racial equity & social impact criteria be included as part of their decision-making process?

D. Stakeholder Power Analysis

1)   **Stakeholder Plotting:**
This exercise will enable you to understand variations of power in order to understand specific needs that can be addressed in your stakeholder strategy. Fill in the chart below with the Stakeholders identified in C.4. above.

Definitions:
Impacted by Decision: Impact is identified by having a positive/negative or missed opportunity to share in the benefit of a Policy or Plan.

Influence in Process: Defined by time, resources, information, familiarity with process and real or perceived ability to influence outcomes.

Influence in Process
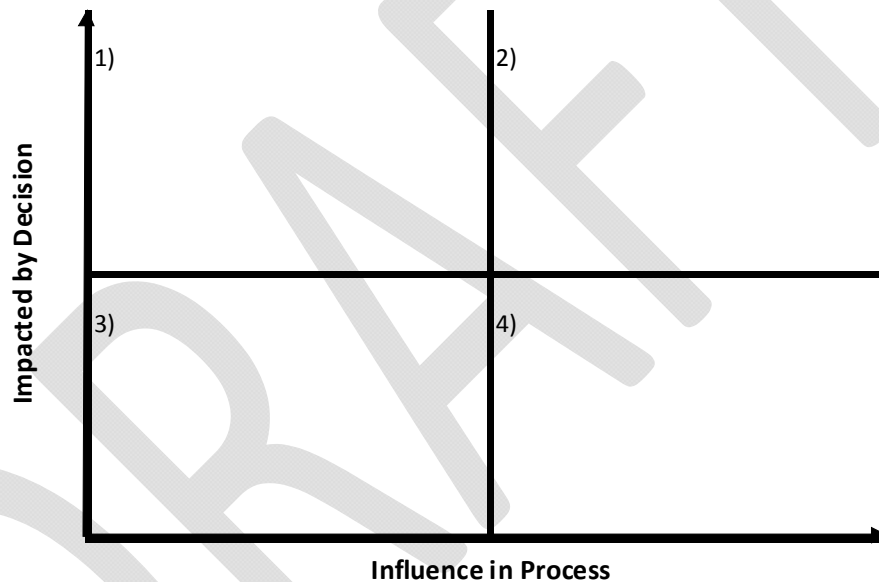
Quadrant 1: Highly impacted, little influence: This group should be prioritized for inclusion efforts
Quadrant 2: Highly impacted, high influence: This group will likely already be at the table. Manage the continued participation, and sharing influence from those in Quadrant 1.
Quadrant 3: Low impact, high influence: This group should be consulted with for their expertise and influence.
Quadrant 4: Low impact, low influence: This group is not an obvious priority. However, communication should be maintained in order to honor transparency should they eventually shift into another quadrant.

2)   Does one stakeholder group carry more influence than another in regards to your policy or plan? Why, and will you need to make plans to ensure under-represented stakeholders (Quadrant 1) have more equitable influence?

E. Equity Action Feasibility Analysis

Each community may experience different benefits or burdens associated with the plan or policy under review. *If a specific community does not benefit from the effects of the policy or plan but does not necessarily feel a direct burden, this is considered a "**missed opportunity**".*

This tool enables you to in detail assess and decide on different actions that can be taken to mitigate burdens, enhance benefits, or avoid miss opportunities with underrepresented communities.

1) Provide a brief description of these impacts (positive, negative and missed opportunities) and include a description of why these differential impacts occur.

a) Populations Affected *(As identified in Quadrant 1 of the Stakeholder Plotting exercise)*	b) Describe Potential Positive Impacts (Beneficial)	c) Describe Potential Negative Impacts (Adverse)	d). Describe Potential Missed Opportunities (Oops)
A.			
B.			
C. (Add rows as needed)			

2) What are the opportunities for action?

In partnership with stakeholders and community members, identify the actions that you are either currently taking or could potentially take to enhance the positive and/or mitigate the negative impacts of plan or policy work. Also, identify ways to address the missed opportunities.

Populations Affected *(As listed in A. above)*	Existing or Potential Actions to Enhance the Positive Impacts *(As identified in the table above.)*	Existing or Potential Actions to Reduce the Negative Impacts *(As identified in the table above.)*	Existing or Potential Actions to Address Missed Opportunities *(As identified in the table above.)*
A.	1.	2.	3.
B.	4.	5.	6.
C. (add rows as needed	7.	8.	9.

3) Prioritize the actions based on the level of impact and feasibility.

For each action identified in Question 2, rank how effective the action is at improving equity, in terms of 'Low', 'Medium' or 'High'. Also, in terms of 'Low', 'Medium' or 'High', rank the feasibility of implementation of each action by using the following considerations:

- o *Financial costs of the action*
- o *Non-financial resource needs (staff time, partnerships, etc.)*
- o *Political feasibility of implementation*
- o *Who will implement the action*
- o *What is the timing of the action*

Potential Action *(As identified in Question 2 above)*	Rank the **Effectiveness of Improving Equity** (Low, Medium, or High)	Rank the **Feasibility of implementation** (Low, Medium, or High)
1.		
2.		
3.		
4.(Add rows as needed)		

4) Plot the actions on the chart below, using the assigned rankings for effectiveness and feasibility of implementation from Question 3 above.

Note: Some actions may present implementation challenges (low feasibility rating), but are extremely effective at addressing equity considerations; the intent of this ranking exercise is to not dismiss these actions, but present information on the considerations that need to be made to move these actions to implementation.
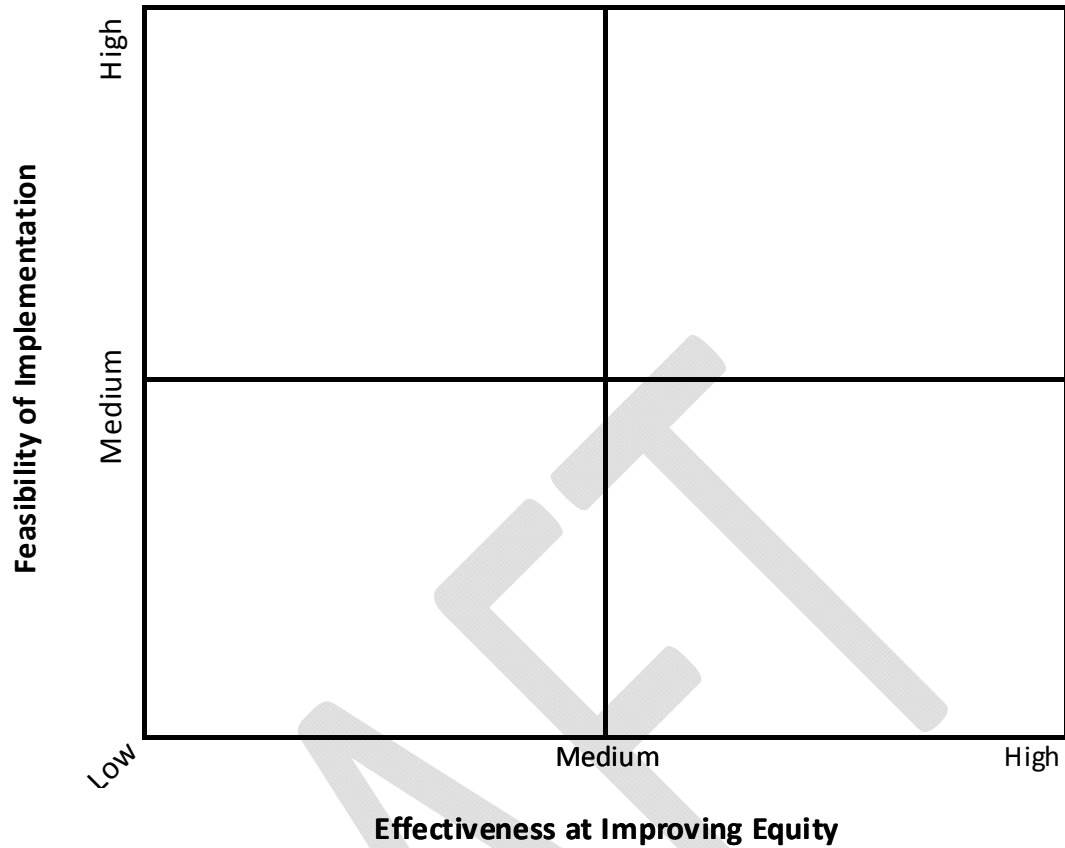
5) Based on the results identified above, list the priority actions to be recommended for implementation:

Priority Action	Implementation Plan – Including any strategies that will increase the likelihood of implementation for actions that look to be most effective at improving equity.	Responsible Party	Timeline for Implementation
1.			
2.			
3.			
4.			

F. Community Engagement
(SECTION TBD from Community Engagement Manual)

Outreach and Marketing Material Quick Check

Is the language used to market the program geared towards a mainstream educated, middle and high income audience?	Yes	No	Possibly
Are marketing, outreach, & advertising available through non-mainstream avenues?	Yes	No	Possibly
Is there enough time or money allocated to properly market and advertise the project/program to under-served communities?	Yes	No	Possibly
Have project/program materials been translated into languages other than English (and spoken in the target area)?	Yes	No	Possibly
Is there a direct plan on how to market the program to historically under-represented communities of color?	Yes	No	Possibly
Does the project/program have pre-existing relationship with historically under-represented communities of color	Yes	No	Possibly
Other:			

1) How have the voices of groups currently or potentially affected (positive, negative or missed opportunity) by the project, program or policy been involved with its development? If they have not, why? Is there support among those groups for the project, program or policy? Why or why not?

   _____
   _____
   _____

2) Who participated in the equity impact review process?

   _____
   _____
   _____

G. Project/Program Budget

Before you begin this section: Refer to your Stakeholder Identification & Partnership Analysis (Section C,D), Racial Equity Analysis (Section E), and Outreach, Public Engagement & Communications Plan (Section G) to answer questions in this Section.

1) What is the secured amount of funding for your project/program? Is this an annual or one-time amount?

2) Does the funding have key restrictions, controls, or time limits, and if so who is dictating these constraints?

3) If you plan on hiring staff, what steps can you take to help increase work force equity?

4) If you plan on hiring consultants, what steps will you take to help increase contracting equity?

5) Are there opportunities to purchase materials or goods from a women or minority owned business?

Attach a dated copy of your rough or detailed line item project/program budget.

H. Data Collection and Evaluation Plan

Before you begin this section: *Refer to your responses in Sections 2 – 6 to help answer the following questions.*

1) What is your project/program's demographic data collection plan?

2) How will the collection of demographic data be used to help determine whether you have reached your target audience, or whether inequity is occurring?

3) If you plan on conducting any type of survey or focus group, how will you account for the equitable participation and input of low income persons, persons of color, including non-English speaking persons?

4) Do you have plans, or have you developed and/or implemented a program evaluation?

   ▪ If yes, please attach a copy of your latest evaluation report/results.

   ▪ If no, how is success going to be measured (what are the measurements of your program's success)? What tools will you need to measure your program's success?

5) What key process-related accomplishments (and accompanying target dates) need to be established, or have already been established for you? Please describe.

6) List measureable outcomes, target goals, and/or numbers-served that have been specified for your project/program.

7) Is there a final 'product' to be delivered or developed? If so, please list:

8) Is there an opportunity for you to negotiate or develop measureable outcomes, target goals, numbers-served, or a final 'product' for your project/program? What is negotiable?

9) What **adjusted or new** measureable outcomes, target goals, numbers-served, or final 'products' to be delivered or developed will you propose as a result of conducting a racial equity analysis on this project/program?

10) What are the specific evaluation measures or outcomes that might inform whether racial inequity was occurring?

I. Ongoing Decision-Making Tool

Directions:
Use this tool for decision-making processes that happen throughout implementation with your project, program, policy, or planning team.

A. Do we have a solid multi-faceted understanding of the decision and its impact across all groups BPS serves?
B. What are the potential racial and or service disparities related to this decision? What are the intended and unintended consequences from the decision, especially as it relates to racial or service disparities.
C. How does the proposed decision support systemic change and help achieve racial and service equity?
D. How does the proposed decision support work force equity and/or contracting equity?
E. Are there missed opportunities to leverage other decisions we have made or will make in the near future?
F. What would it look like if equity was integrated into the decision-making process at the beginning?

Follow up plans or actions:

Who is responsible?

Estimated report back timeline: