



## Board Report

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**File #:** 2020-0514, **File Type:** Informational Report

**Agenda Number:** 40.

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### EXECUTIVE MANAGEMENT COMMITTEE AUGUST 20, 2020

**SUBJECT: EQUITY AND RACE PROGRAM UPDATE**

**ACTION: RECEIVE AND FILE**

#### **RECOMMENDATION**

RECEIVE AND FILE status report on the Equity and Race Program.

#### **ISSUE**

This report outlines the activities taken under the leadership of Metro's new Executive Officer, Equity and Race and plans to continue implementing the Metro Equity Platform Framework adopted by the Board in March 2018.

#### **BACKGROUND**

Metro's Equity Platform ("Platform") was approved by the Metro Board of Directors ("Board") in March 2018 (Attachment A). The core objective is to increase access to opportunities including housing, jobs, healthcare, education, and other key determinants of health and thriving communities. The Platform is explicit in its focus on the vast disparities that exist in access to opportunity and is intended to help identify and implement projects or programs that reduce and ultimately eliminate those disparities. It is driven by access needs, not geographic equality, though some disparities have a geographic element.

The Platform provides a framework for advancing equity. It has been incorporated into Metro's Vision 2028 Strategic Plan and must be a critical factor in our decision making. In 2019, Metro published an Equity Platform FY19 Activation Plan (Attachment B) to highlight the Platform's broad portfolio of current, planned, and conceptual initiatives, and to show the Platform's intent and the distance the agency still has to go to fully realize the Platform's potential and impact for change. In January 2020, Metro welcomed the first Executive Officer, Equity and Race to lead, coordinate, and develop implementation of efforts under the Platform.

#### **DISCUSSION**

The Equity Platform stands on four pillars - Define and Measure, Listen and Learn, Focus and Deliver, and Train and Grow. Progress over the last six months and objectives for the future under

each of the four pillars are outlined below:

**A. Define and Measure**

Under this pillar, we are tasked with defining equity, defining the target communities in need of more equitable transportation investments, determining how to measure disparities and gaps in opportunity, and understanding the benefits and burdens of our services, programs, and policies and how they are shaped by those disparities and gaps.

- 1. Equity Definition** - Since the adoption of the Equity Platform, there has been a growing need to define equity, to help orient Platform efforts, and clarify what equity is and is not in the context of the Platform. Accordingly, Metro has developed the following definition of equity. Moving forward it will be used to orient our work around equity and create project specific equitable outcomes.

“Equity is both an outcome and a process to address racial, socioeconomic, and gender disparities, to ensure fair and just access - with respect to where you begin and your capacity to improve from that starting point - to opportunities, including jobs, housing, education, mobility options, and healthier communities. It is achieved when one’s outcomes in life are not predetermined, in a statistical or experiential sense, on their racial, economic, or social identities. It requires community informed and needs-based provision, implementation, and impact of services, programs, and policies that reduce and ultimately prevent disparities.”

- 2. Defining High Need Areas** - One of the first steps Metro took under this pillar was to try to identify target communities, where strategic transportation investments can have the greatest impact in eliminating disparities. Accordingly, in September 2019, the Board approved the Equity Focused Communities (EFC), as a working definition. This definition has been used in various projects from the Long Range Transportation Plan (LRTP) to the Business Solution Center Expansion study to the TOC Implementation Plan. Other projects have created project specific definitions of high need areas, that include some EFC factors (race, income, car ownership), along with additional factors. The NextGen Bus Study and Plan’s Transit Propensity Index is a great example. Moving forward, the Executive Officer, Equity and Race will continue to work with project teams across the agency from the Better Bus Initiative to the Goods Movement Strategic Plan to the Comprehensive Pricing Study, and community members, as they work to understand disparities and needs in the context of their specific projects.

- 3. Agency-wide Equity Assessment** - While it’s important to address the equity impacts of each Metro decision, it’s also important to understand how we are performing at a macro -level, what decisions and strategies would help the agency perform better, and how to prioritize decisions and investments based on equity. To that end, over the next year the Office of Equity and Race will explore development of an agency-wide equity study, to create a baseline understanding of key disparities, challenges, successes, and opportunities, including community and employees perceptions of Metro’s performance related to Equity, Diversity, and Inclusion. We will then use that to inform an Equity Strategic Plan. While there are resource constraints, given the importance of this work, we will consider a phased approach.

**B. Listen and Learn**

Under this pillar Metro must improve its efforts to listen and learn from the communities that we serve, to understand how to better serve them. It pushes us to focus on the needs of those faring the worst, recognizing that opportunity doesn't trickle down, it cascades up, and if we understand how to increase access to opportunity for those faring the worse, we will be able to increase access for all. It also focuses on meaningful community engagement as opposed to outreach. To implement this pillar, the Executive Officer, Equity and Race has joined ongoing projects and engagement efforts, been appointed to lead, partner with, or develop new workgroups, and joined national and local conversations about Equity in transportation and the built environment.

- 1. Community Based Organization (CBO) Partnership Strategy** - Responding to lessons learned from the Blue Line, First/Last Mile Plan's transformative approach to partnering with Community Based Organizations, the Communications, Planning, Vendor and Contract Management Departments have continued to prepare a new policy to guide enhanced partnerships with CBOs on several levels, including a clear process for contracting opportunities within Metro's larger public engagement efforts. The Executive Officer, Equity and Race has joined this team and Metro is exploring how her office can support this effort as it moves to implementation.
- 2. Community Safety and Security** - Another outgrowth of the work on the Blue Line, First/Last Mile Plan was the formation of the Community Safety and Security Work Group (CSSWG). In early 2019, it was developed to help Metro work with community members to listen to and address neighborhood and rider concerns regarding Metro safety and security. Upon joining Metro, the Executive Officer, Equity and Race was appointed to lead the CSSWG and hosted one meeting in May 2020. In July 2020, the Metro Board directed Metro's Chief Executive Officer to establish a Transit Public Safety Advisory Committee that incorporates the existing CSSWG. As directed the Executive Officer, Equity and Race will work with the Committee, Office of Civil Rights, Executive Officer for Customer Experience, and the Office of Safety, Security, and Law Enforcement to develop a community-based approach to public safety on the transit system.
- 3. WHAM Taskforce** - The WHAM Taskforce includes representatives from each of the agencies overseeing Measures W, H, A, and M and its goals are to create efficiencies across the programs, eliminate redundancies, coordinate programmatic and project planning, implement specific multi-benefit projects, and leverage W, H, A, and M funding with existing County and other funding resources. The Executive Officer, Equity and Race is the Metro representative on the task force and will coordinate across the agency to fulfill Metro's tasks under the Taskforce's strategic plan.
- 4. Aging Disability Transportation Network (ADTN)** - The ADTN is a coalition of groups working with people with disabilities and older adults, formed in 2017, which emerged through advocacy efforts starting with development of the 2016-2019 Coordinated Plan. The ADTN has partnered with Metro in the development of the Board directed 2019 Aging and Disability Report and the corresponding Forum, and will continue partnering with Metro as we work to draft the next Coordinated Plan and address various recommendations from

the coalition to better support people with disabilities and older adults. The Executive Officer, Equity and Race has been appointed to lead Metro's efforts in partnering with the ADTN and will lead coordination across the agency to support related efforts to better meet the needs of people with disabilities and older adults.

5. **Equity Advisory Board** - While Metro will continue partnering with the Equity Committee of the Policy Advisory Council as a technical advisory body as we work to implement the Equity Platform, we are still exploring the development of an Equity Advisory Board. This board would include Equity thought leaders throughout LA County, California, and potentially, the Country. This would be an interdisciplinary group charged with advising the agency on specific topics and issues with equity concerns, especially those which intersect between transportation and other disciplines and opportunity areas.
6. **National and Local Conversations** - Since joining Metro, the Executive Officer of Equity and Race has been very active in local and national conversations around Equity, Diversity, and Inclusion in Transportation and the Built Environment. She has participated in virtual panels hosted by various industry partners from the American Public Transportation Association to Transit Center to the Rail~volution National Steering Committee. She has also participated in panels hosted by local chapters of industry associations including the American Planning Association, Urban Land Institute, and American Institute of Architects. She has presented to or led conversations with local stakeholder groups from Move-LA and Investing in Place to the San Fernando and Gateway Cities Council of Governments. As implementation of the Equity Platform continues, the Office of Equity and Race will continue participating in national and local conversations to discuss best practices, learn from other experts in the field, build partnerships, and generally support and encourage efforts to advance equity in transportation and the built environment.

C. **Focus and Deliver**

This pillar charges Metro with carrying out processes supported by the Equity Platform objectives and principles, which ensure that our actions, programs, and policies lead to more equitable outcomes. It incorporates what's learned from the first two pillars to help us plan, build, invest, and operate in a manner that removes barriers and supports increased access to opportunity for all.

1. **Equity Tool** - Since January 2020, the Executive Officer, Equity and Race has explored the development of a guiding tool to help Metro consistently identify equity concerns and solutions to improve access to opportunity. While the EFC definition helps define high need communities, the Equity Tool will help support more substantive assessments of impacts on those communities by exploring and answering key questions. While still in the development phase, in its current draft form, the tool is a form with a series of questions to guide Metro in developing, implementing, and evaluating programs, plans, and other decisions. It is based on two ideas: 1) deep-rooted and pervasive racial and socioeconomic inequities exists that create disparate impacts, even when the intention is to help all, and 2) we must understand the root causes of those inequities in order to develop solutions that help those faring the worse to actually improve access to opportunity for all. It's based on

the results-based accountability framework developed by Mark Friedman, which is also the basis of the race equity tools developed by the Government Alliance on Race and Equity, in which Metro is a member. During Fiscal Year 2021, the Executive Officer, Equity and Race will work with the Equity Liaisons (see below) and the Equity Committee of the Metro Policy Advisory Council to finalize the draft tool and pilot it on at least three projects.

2. **Rapid Equity Assessment** - Early on during the COVID-19 Crisis, the Executive Officer, Equity and Race recognized the need to center our emergency and fast response decisions on equity. Subsequently, she was appointed as a member of the COVID-19 Recovery Taskforce (Taskforce), and by the second meeting the Taskforce established an equity subcommittee which the Executive Officer, Equity and Race would lead. The committee agreed that they needed a tool to help assess all recommendations that would come from the Taskforce. Initially they explored the draft Equity Tool but determined they needed something simpler for the fast-paced nature of the taskforce process. The Executive Officer, Equity and Race drafted the Rapid Equity Assessment (Attachment C) and worked with the Equity Subcommittee to pilot and fine-tune it. The Rapid Equity Assessment tool has been applied to all Taskforce recommendations and used to help prioritize decisions. In an effort to expand its use, the tool was presented to the Metro Senior Leadership Team. Over the next fiscal year, the Executive Officer, Equity and Race will work with the Equity Liaisons to build capacity to use the Rapid Equity Assessment Tool across the agency, with a goal of eventually requiring use of an equity tool for most Metro decisions.
  
3. **Agency-wide Project Support** - Since the establishment of the Equity Platform, Metro has worked to incorporate its principles into various projects and programs, including some that are at or near completion, such as NextGen, the Understanding How Women Travel Report, and the Long Range Transportation Plan, to name a few. Over the last six months, the Executive Officer, Equity and Race has assisted with new and on-going projects to do the same. From the COVID-19 Recovery Taskforce to the 710 South Project, the Comprehensive Pricing Study to Transit Oriented Communities Implementation Plan and several others, she has worked in roles that range from occasional consulting to regular workgroup membership, to support projects as they explore how to create more inclusive project development processes and plan for equitable project outcomes. These efforts will continue into FY21 and be supplemented as Metro expands Office of Equity and Race and trains its Equity Liaisons and others to support this work.

#### **D. Train and Grow**

This pillar focuses on Metro as an organization and recognizes that successful implementation of the Equity Platform requires commitment, education and training, and prioritization of the Platform's principles across Metro at all levels and in all departments. This pillar will be implemented by efforts of the Office of Equity and Race as well as the Department of Civil Rights and Inclusion in partnership with the Department of Human Capital and Development and other Departments, as applicable.

1. **Agency-wide Education and Conversations** - The Executive Officer, Equity and Race joined Metro in late January, just before the COVID-19 pandemic reached Los Angeles

County and a few months before the civil unrest sparked by the deaths of George Floyd and Breonna Taylor began. Between the public health crisis' disproportionate impact on Black, Latinx, and Indigenous communities, the rise in COVID-19 related racist attacks on people of Asian descent, and the spotlighting of historic and present systemic racism and anti-blackness in America, the need and desire to have conversations and develop actions to create a more equitable and inclusive society at Metro have only amplified.

To meet that need and implement this pillar, the Executive Officer, Equity and Race has met with various units and sometimes departments to present on the Equity Platform and discuss how Metro can advance equity through our work. She has also joined the Metro Chief Executive Officer and Chief Civil Rights Officer to facilitate an employee town hall to discuss the civil unrest. She has presented to SLT to introduce the Rapid Equity Assessment and explore eventually requiring an equity section in all board reports.

Metro will work to build the internal infrastructure to support a future required equity section in all board reports, that provides a substantive analysis of a decision's equity impacts. The Executive Officer, Equity and Race will continue meeting with staff across the agency and explore the development of a racial equity training for all staff. In the more immediate, the Executive Officer, Equity and Race is working to launch a voluntary Justice, Equity, Diversity, and Inclusion (JEDI) Book Club for employees who want to educate and empower themselves to be JEDI advocates.

- 2. Equity Liaisons** - In June 2020, the Executive Officer, Equity and Race established the Equity Liaisons Working Group, which includes one to two staff from each Metro department. The Liaisons were nominated by their respective SLT member and are leaders in their departments, with interest in helping Metro advance equity and a desire to learn and grow. The goal of the Equity Liaison Working Group is to build an internal team of equity fluent leaders to help support implementation of the Equity Platform. The Equity Liaison work plan includes, but is not limited to, learning key concepts related to justice, equity, diversity, and inclusion; being trained to use, help test, and strengthen the application of equity tools; advising on Equity Platform implementation efforts; and helping to identify opportunities and challenges to addressing equity within each department and the agency as a whole. The Equity Liaisons meet regularly and will continue through FY21 and beyond.

In summary, these highlighted initiatives should not be viewed as the only elements that will impact, support, or add to the implementation of the Equity Platform. The Platform will be carried out through an ongoing portfolio of agency actions.

## **FINANCIAL IMPACT**

Implementation of the Equity Platform will in many cases involve shaping and adjusting the direction of current projects within existing budgets. In other cases, it will require new activities and program development. Metro will need to build the staff infrastructure and provide sufficient resources to support all Equity Platform implementation activities. Where a proposed equity-based initiative requires stand-alone revenues, a separate budget action would be taken.

### **Impact to Budget**

There is no impact to the existing extended FY19-20 budget as a result of this Receive and File

report.

### **IMPLEMENTATION OF STRATEGIC PLAN GOALS**

This recommendation supports strategic plan goals #1.1, 3.1, 3.2, 3.3, and 3.4 by helping Metro to target infrastructure and service investments toward those with the greatest needs and enhancing communities and lives through mobility and access to opportunity. Implementation of the equity framework is an explicit recommended action under the goals 1.1 and 3.3, and it supports actions under 3.1, 3.2, and 3.4.

### **NEXT STEPS**

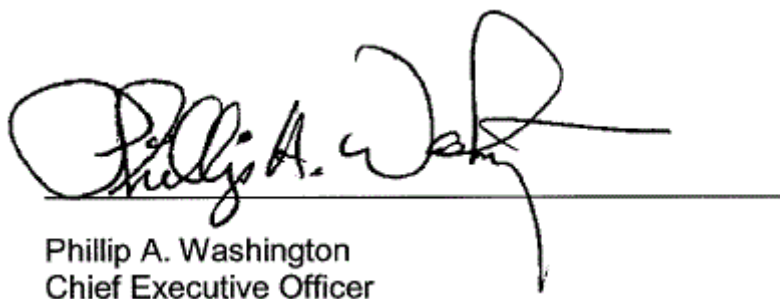
Staff will report on milestones achieved on individual Equity Platform actions and provide overall updates on an ongoing basis, as appropriate.

### **ATTACHMENTS**

- Attachment A - Metro Equity Platform Report
- Attachment B - Equity Platform FY19 Activation Plan
- Attachment C - Rapid Equity Assessment Tool

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## Board Report

File #: 2017-0912, File Type: Policy

Agenda Number: 21.

**REVISED  
EXECUTIVE MANAGEMENT COMMITTEE  
FEBRUARY 15, 2018**

**SUBJECT: METRO EQUITY PLATFORM FRAMEWORK**

**ACTION: ~~RECEIVE AND FILE~~ APPROVE METRO EQUITY PLATFORM FRAMEWORK**

### **RECOMMENDATION**

APPROVE Metro's Equity Platform Framework.

### **ISSUE**

Access to opportunity should be a core objective of public decision making, public investment, and public service - and transportation is an essential lever to enabling that access. Unfortunately, there exists vast disparity among neighborhoods and individuals in Los Angeles County in their ability to see and seize opportunity - be it jobs, housing, education, health, safety or other essential facets of thriving in vibrant, diverse communities. A multi-point equity platform provides a basis for Metro to actively lead and partner in addressing and overcoming those disparities.

Metro staff does not approach the subject of equity lightly or uninformed. The adoption of Measure M included performance metrics that were tied to disadvantaged communities. The major revision to the Long Range Transportation Plan has committed to incorporating equity as a crosscutting issue since its introduction to the Board in February 2017. The Policy Advisory Council has flagged this as a major topic of interest. Most importantly, recent and engaged experience with community members with several projects (i.e., First/Last Mile planning, the Transformative Climate Communities grant for Rail to Rail, and a body of innovative workforce development initiatives) all underscore both the timeliness and urgency that equity considerations bring to Metro's portfolio. In addition, staff informally reached out to representatives from academia, foundations, advocacy organizations and local government in developing this platform. Their demonstrated experience in research and collective action, and their candid feedback on challenges and opportunities in the equity space were invaluable.

### **DISCUSSION**

Metro's multi-point equity platform is wrapped around four pillars.

First, we need to define a common basis for talking about and building an agenda around equity, and how to improve it.

- Equity holds different perspectives and priorities for everyone and anyone who will be part of



this conversation.

- At its core, *inequity* exists when there are fundamental differences in access to opportunity, not just with respect to where you begin, but in your capacity to improve from that starting position.
- Historically and currently, race and class have largely defined where these disparities are most concentrated: in poor, minority communities throughout LA County. Age, gender, disability, and residency also can expand or constrain opportunities.
- It would be presumptuous to begin a truly inclusive conversation with a pre-determined definition of “equity” and all its facets, but Metro can enter into that conversation committing to the following:
  - Establish meaningful goals around a shared definition of equity and actions to achieve those goals.
  - Define metrics to evaluate outcomes and consider redirected actions if needed. It will be particularly critical to infuse equity-based performance metrics in Metro’s investment decisions. These cannot be the only investment considerations. Transportation is rife with tradeoffs. But equity metrics need to be definable, impactful, measurable, accountable, and at the front end of the analysis, not the back end.
  - Seek and invite the diverse range of voices that must participate with Metro in accomplishing the above. Importantly, we need to proactively reach out to those who have remained on the margins of decision-making in the past. These will include historically underserved communities and organizations that represent them. But we must also reach out and hear voices that may not be aligned with established groups.

Second, Metro needs to establish comprehensive, multiple forums to engage the community meaningfully and actively in pursuit of the first step discussed above. An important opening conversation with LA’s community members would address: a) where they believe achieving equity has been problematic - broadly, and specific to transportation’s role; and b) where improved relationships, partnerships and actions aligned with Metro’s portfolio of responsibility can be defined to advance more equitable transportation outcomes going forward.

- This will be a challenging conversation, insofar as it requires the Metro as Board and staff to invite the community to articulate where it has experienced, in fact deeply felt, inequity in Metro’s past. This isn’t a platform for Metro to defend or be defensive; people feel what they feel, and it is going to be impossible to define a new path and build a different position of trust if past experience is not given voice and legitimacy.
- That said, the main point of this conversation forum should be to learn and move forward based on that acknowledgement. This may require reconciling divergent opinions to arrive at some shared goals and actions. Actions going forward may redress past ills - that is to be determined - but they certainly should not repeat them, if at all possible. It is also an opportunity to discuss with community members those initiatives where Metro has actively tackled disparity gaps, such as its growing portfolio of workforce development initiatives.
- Advice and best practices on how to effectively have these community-driven conversations

will be key.

- Metro can start with lessons learned from other cities across the country. San Francisco, Seattle, Oakland and others all have models to tap.
  - These forums would benefit from professional facilitation. Foundations have established several venues that Metro might pivot from (e.g. the on-going national Strong, Prosperous and Resilient Communities Challenge (SPARCC) Initiative includes Los Angeles as a participating city - LA Thrives coalition is the local lead; the California Endowment and others have underwritten numerous initiatives across the County); or seek new support.
- As noted at the outset, Metro consulted with equity thought leaders whose advice informed the core of this platform. Retaining this cross-sectional consultation will be critical to successfully implementing a platform that requires dedication and time. In particular, the community forums envisioned will benefit from a circle of demonstrated leaders. We certainly don't hold all the keys on issues, and making use of the rich resources around us is essential.
- A key step will be to establish a formal or informal advisory group supporting the equity platform, and to incorporate, as appropriate, the equity agenda into existing advisory groups.
- In addition, the following initiatives are also suggested:
- Actively develop and invest in a Community Based Organization (CBO) oriented public engagement program. This approach may not be applicable to every Metro investment, program or activity located in, or otherwise impacting, LA County's historically underinvested (HU) communities. As stated above, we must be mindful that any single group does not represent all voices in every community. However, this approach should be added to and implemented as part of our public process, if we are going to establish and maintain legitimacy within impacted communities when addressing equity issues that they themselves are experiencing directly.
  - Invest in the transportation technical capacity of local governments that serve HU communities. Metro cannot and should not be the sole partner in all transportation or transportation-impacted decisions, legally or practically. And traditional funding and regulatory programs in particular assume effective participation by local jurisdictions. In short, strengthening cities that are home to equity communities is probably a core requirement for a more equitable County. This assistance can range from delivering transportation improvements swiftly and effectively to competing for discretionary funding more successfully; to better supporting more community-inclusive decision-making around transport investments.

Third, the Long Range Transportation Plan (LRTP) must have a concentrated focus on equity. There are two major arenas for that focus to take root.

#### Where Metro **Leads**

- First and foremost, we must tackle impacts of the LA County's transportation system under our

direct responsibility via Metro's role as transportation planner, operator, builder and funder. As such, equity is a "cross cutting" principle that will be applied throughout the LRTP's development, as reported to the Board in prior presentation's on the Plan's design and rollout.

- Critically, what we choose - or do not choose - to invest in that system is paramount. Over the 40-year span of the LRTP, a considerable amount of funding controlled by Metro is legally or legislatively dictated, such as Measure M. It should be noted that equity related factors were considered as part of the 5 performance measures developed to assess and prioritize Measure M's expenditure plan projects. Specifically, the "Economy" and "Sustainability/Quality of Life" themes included metrics attached to investments in disadvantaged communities. But while there are important additional equity considerations Metro can assess as projects are implemented, there are practical limitations to rethinking or redirecting certain funds that are statutorily prescribed.

However, a significant amount of funding in the long range plan is not yet locked down for 40 years, allowing us to reassess current patterns of investment and either reaffirm them or change them.

- These investment decisions should be based on performance outcomes and, as presented here, front and center considerations should be given to those that actively:
  - advance outcomes that promote and sustain opportunities in underserved communities; or
  - avoid outcomes that lead to or aggravate disparities in opportunity in those communities.
- Notably, investments must be made to operate, maintain and rebuild the existing transportation system, in addition to expanding it. The community's ability to access that transportation system - where, when, how, and at what cost - impacts their opportunities to jobs, housing, education and health. Thus, measuring equity against that access, and for whom, is central to our planning process.
  - In this realm, there will be several, discrete transportation activities that will be developed alongside the LRTP where equity will be front and center: any discussion of "right sizing" fares, redesign of the Metro bus system, our continuing work in Work Force Development and small business support, to name a few.
  - The Long Range Transportation Plan will not duplicate analysis and recommendations in these areas. It will incorporate goals, decisions, and any actions attached to all of them, and will likely help facilitate equity-driven discussions in each of them.
  - These issues address critical transportation access concerns, and will be important venues for coordinating community involvement.

### Where Metro **Partners**

- Beyond its core transportation responsibilities, there will be an expectation to take on a new, countywide, visible equity challenge: the Metro transport system's interface with gentrification/displacement/affordable housing.

- Neighborhoods throughout the county are facing escalating housing costs, real estate developments that are reshaping community culture, and in both cases, frequently forcing existing residents into painful relocation or transportation decisions. Gentrification/displacement/affordable housing is a common thread of concern among elected officials and advocates. And it hits every corner of the County.
- Metro cannot address this subject by ourselves - it will require active partnerships with others, such as the County, cities, Council of Governments, private sector and business as well as community representatives. Foundations are extremely interested in this arena and could bring valuable resources to the table.
- Among other considerations, these issues underscore the complexity of equity concerns and the necessarily complex response to them. By taking up a big problem - but not Metro's problem alone - it gives us the space to explore, experiment and advance change while building necessary partnerships at the outset.

Fourth, we need to pursue equity training within Metro. Successfully setting and delivering on a new equity agenda requires "top to bottom" ownership throughout the agency.

- In recent years, there has been a growing body of equity training designed for governmental agencies. LA County departments have deployed these programs, among others. We intend to explore options and commit to internal education that would be required at certain levels and positions.
- Training would be in two important areas:
  - Methods to evaluate equity including data collection, measurement and analysis; and
  - Approaches to effectively communicate and work with communities in a manner that recognizes and respects equity issues.

This platform is a starting point, and should be considered a working outline that can be adjusted with experience and feedback. The commitment expressed herein, however, should be a guiding constant - for Metro, our transportation partnerships, and the people we serve.

### **NEXT STEPS**

Staff will proceed to use the Equity Platform as a framework for specific analyses and actions attached to Metro initiatives, as outlined in this report. Progress will be reported periodically to the Board, particularly as it relates to key plans and programs underway, such as the Long Range Transportation Plan.

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# Metro Equity Platform Framework

Executive Management Committee  
February 15, 2018  
Legistar File 2017-0912



**Metro**

# Metro Equity Platform Framework

Access to opportunity: a core concept to public decision-making, public investment, and public service

- Vast disparity exists in LA County among neighborhoods and individuals:
  - To seize opportunity – jobs, housing, education, health, safety;
  - To improve their circumstances to do so.
- Transportation is an essential lever to enable that access.



# Metro Equity Platform Framework

## Why an Equity Platform now?

- As a transportation leader, Metro can and should address disparities.
- Metro has already signaled a change:
  - Measure M: performance metric considerations
  - New Long Range Transportation Plan committed early to Equity
  - Recent, targeted community collaborations (First/Last Mile, Rail to Rail grant effort)
- Exploratory outreach to LA County equity thought leaders





# Metro Equity Platform Framework

Multi-point Equity Platform built around four pillars:

I. Define and Measure

II. Listen and Learn

III. Focus and Deliver

IV. Train and Grow



# Metro Equity Platform Framework

## I. Define and Measure

Need a common basis to build an equity agenda.

- “Equity” holds different perspectives and priorities for many.
- Inequity → fundamental differences in access to opportunity
- Race and Class—historically and currently—predominate disparities in LA County
  - Concentrated in poor, minority communities
  - Age, gender, disability, and residency also can expand or constrain opportunities



# Metro Equity Platform Framework

## I. Define and Measure (cont.)

- Pursue an inclusive conversation that commits to:
  - Establish meaningful goals around a shared definition of equity – and actions to achieve those goals;
  - Define metrics to evaluate outcomes, including investment decisions;
  - Ensure consideration at the front end, not the back end;
  - Seek out and involve the diverse range of voices that must collaborate on above.



# Metro Equity Platform Framework

## II. Listen and Learn

Establish comprehensive, multiple forums to engage the community meaningfully and actively in defining, measuring and acting on equitable outcomes.

- Open the conversation with LA's community members to address:
  - where achieving equity has been problematic — broadly, and specific to transportation;
  - where improved relationships, partnerships and actions can advance more equitable transportation outcomes going forward.



# Metro Equity Platform Framework

## II. Listen and Learn (cont.)

- Recognizing past experience provides foundation for a different future.
- Community-driven conversation is essential.
  - Seek best practices.
  - Establish distinct advisory body for the equity agenda.
  - Engage CBOs in community outreach and problem solving.
  - Build local government technical capacity serving historically underserved communities

# Metro Equity Platform Framework

## III. Focus and Deliver

The Long Range Transportation Plan is unifying activity with 2 major crosscutting Equity arenas:

- Where Metro Leads
  - Transportation planner, operator, builder and funder;
  - Performance-based investment decisions that:
    - a) advance outcomes to promote and sustain opportunities;
    - b) avoid outcomes that aggravate disparities in opportunity;
  - Operating/maintaining the system impacts opportunity as much as infrastructure investments.

# Metro Equity Platform Framework

## III. Focus and Deliver (cont.)

- Where Metro Partners
  - Beyond Metro's core transportation responsibilities—Land Use
  - Gentrification/displacement/affordable housing
    - An urgent issue in every corner of the county
    - Metro cannot address alone—Partners are essential: local government, business, community advocates, foundations

# Metro Equity Platform Framework

## IV. Train and Grow

A new equity agenda requires “top-to-bottom” ownership throughout the agency.

- Training in two important areas:
  - Methods to evaluate equity including data collection, measurement and analysis;
  - Approaches to effectively communicate and work with communities with priority and respect for equity issues.



# Metro Equity Platform Framework

## Next Steps

- The Equity Platform is a framework.
- It intends to shape specific analyses and actions going forward.
- Experience may redirect and improve the platform.
- The PAC is an essential touchstone for input and checkpoint for progress.
- Presentations to the Metro Board are key.



Thank you



Metro®



**Board Report**

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**File #:** 2018-0580, **File Type:** Plan

**Agenda Number:** 39.

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**EXECUTIVE MANAGEMENT COMMITTEE  
JANUARY 17, 2019**

**SUBJECT: EQUITY PLATFORM FY19 ACTIVATION PLAN**

**ACTION: RECEIVE AND FILE**

**RECOMMENDATION**

RECEIVE AND FILE Equity Platform FY19 Activation Plan.

**ISSUE**

This report outlines the set of activities that Metro is pursuing to implement the Metro Equity Platform Framework adopted by the Board in March 2018.

**DISCUSSION**

The Equity Platform (“Platform”) stands on four pillars - Define and Measure, Listen and Learn, Focus and Deliver, and Train and Grow (Attachment A). Because the Platform is designed to inform, shape and guide all lines of the agency’s business, on a continuing basis, this “activation plan” highlights a broad portfolio with some elements that are and will be on-going; current or planned projects that have a discrete beginning and end; and new initiatives still in the conceptual stage. This mix underscores the reach and depth of the Platform’s intent - and likewise illustrates the distance the agency still has to go to fully realize the Platform’s potential and impact for change. Incorporated into the agency’s recently adopted Vision 2028 Strategic Plan, the Platform will never be a singular task that is finished; instead it is an agency commitment to incorporate Equity principles into, and pursue equitable outcomes emerging from, everything we do.

It is important to reiterate the basis of the Equity Platform, and what outcomes are intended to be achieved. While we acknowledge many different definitions of “equity” exist, the Platform is explicit in its focus on the vast disparities in access to opportunity -- jobs, housing, health care, and education to name a few -- among many people and communities within Los Angeles County. Race and income have and continue to be strong indicators of where these gaps exist. The Equity Platform is intended to help identify and implement projects or programs that close or eliminate those gaps. Equity defined here is not a calculated geographic distribution -- it is a set of outcomes driven by access needs, though such needs may be located in many places. Equity will not be the sole criterion for investments, but it is a critical one that must be addressed front and center in our

complex decisions.

Our objectives and progress over the next year under each of the Equity Platform's four pillars are outlined below:

A. Define and Measure

This pillar embraces the key task of defining "equity" in the transportation realm - and where transportation intersects with other disciplines. This must be matched with performance metrics that allow us to determine whether equity, as defined, is being meaningfully achieved as part of Metro's actions. It is essential that equity definitions and metrics be done in a collaborative environment, to include those voices which may not have been previously sought at the forefront of Metro-driven decisions. Efforts include:

1. Work with the Policy Advisory Council (PAC) to define "opportunity gaps" - measurable evidence where inequities exist - and related performance metrics to measure how those gaps can be minimized or closed. This activity is being done as part of the Long Range Transportation Plan that the Board will use to prioritize investments over a 40-year period.
2. Construct and apply equity-driven performance metrics in key Metro initiatives
  - Develop overall guide to consistently identify equity concerns, and solutions, as a component for internal evaluations. This should ideally emerge from the Long Range Transportation Plan definition and performance metric efforts above.
  - In the meantime, include appropriate metrics in both the evaluation and recommendations of major initiatives.
    - For example, the NextGen bus reassessment has established an advisory group that includes representatives from ridership and community advocates; and on-going adjustments are being made to the NextGen analysis to ensure equity considerations are addressed.
  - All Planning Board Reports will include an "equity assessment" section.

B. Listen and Learn

This pillar establishes the crucial connection between Metro and the larger Los Angeles County community in carrying out the principles of the Platform. The following elements have been initiated or are in progress:

1. Establish new partnerships with Community Based Organizations (CBOs).
  - Blue Line, First/Last Mile Plan lessons learned: The Board was briefed in May 2018 on the transformative approach pursued under this study, including the active contributions of CBOs in report development, and the inclusion of CBOs as contracted participants in implementing the project.
  - Responding to lessons learned, the Communications Department is preparing a new policy to guide enhanced partnerships with CBOs on several levels, including a clear process for contracting opportunities within Metro's larger public engagement efforts.
  - As an outgrowth of our engagement work with the Blue Line Metro staff are working with community members to listen to and address neighborhood and rider concerns regarding Metro safety and security.

- On other fronts, the agency is involved with collaborative policy and program efforts, such as serving as a Transportation Working Group co-chair of the South Los Angeles Promise Zone (Slate Z).
2. The PAC has spearheaded community-driven collaborations on Metro's Transit Oriented Communities (TOC) policy development; PAC representatives sitting on other Metro advisory groups (i.e., the Citizens Advisory Council and the Aging and Disability Network) have introduced the Equity Platform in those forums.
  3. Establish Equity Advisory avenues.
    - Staff is considering two tracks to address this "Listen and Learn" recommendation:
      - Assigning the PAC and its associated networks a technical advisory role in Equity Platform implementation (see Define and Measure discussion as one example);
      - Developing a model to draw Equity thought leaders throughout LA County into a "Blue Ribbon Commission" or similar forum to advise staff on specific topics, particular equity concerns that traverse between transportation and other disciplines: affordable housing/displacement; public health; community safety and security.
    - Actively participate in local and national forums addressing equity challenges, to increase Metro's exposure to best practices and to learn from other experts in the field.

#### C. Focus and Deliver

The third pillar addresses the need to implement actions and programs that carry out Equity Platform objectives and principles. Over the next year, these include, but are not limited to:

- Next Gen: revisit/strengthen equity focus
- Women and Girls Governing Council: council agenda includes specific gender-oriented equity studies (e.g. planned RFP and outreach to understand women's travel needs on Metro's system)
- LRTP - apply equity focus throughout the Long Range Transportation Plan's various phases, including identification of vulnerable populations, equity-specific performance measures (see Define & Measure above) and need-based transportation investment analyses.
- Continuing assistance to Disadvantaged Business Enterprise/Veterans Business Enterprise firms (e.g. recent special forums on contracting opportunities with future public/private partnerships)
- Career Pathway initiatives, including the launch of a Transportation School
- Explore the potential to establish consultant assistance to resource-challenged local jurisdictions in Los Angeles County, to enable them to plan and deliver transportation improvements to the underserved communities they represent.

#### D. Train and Grow

This fourth pillar recognizes that implementing the Equity Platform effectively will require significant commitments within the Metro organization to understand, embrace and maximize equity advancements in the other pillars. Commitments include:

- Pursue senior-/executive-level training program in racial equity.

- Work with philanthropic foundations on possible training/seminars geared to Metro-related focus areas.
- Host workshop on technical best practices for equity measurement and analysis among other public agencies and academic institutions.

In summary, these highlighted initiatives should not be viewed as the only elements that will impact or add to activation of the Equity Platform. The Platform will be carried out through an ongoing portfolio of agency actions.

### **DETERMINATION OF SAFETY IMPACT**

There is no impact on safety standards for Metro.

### **FINANCIAL IMPACT**

Implementing the Equity Platform in many cases involves shaping and adjusting the direction of current projects within existing budgets. In any case where a proposed equity-based initiative requires stand-alone revenues, a separate budget action would need to be taken.

#### **Impact to Budget**

There is no impact to the existing FY19 budget as a result of this Receive and File report.

### **NEXT STEPS**

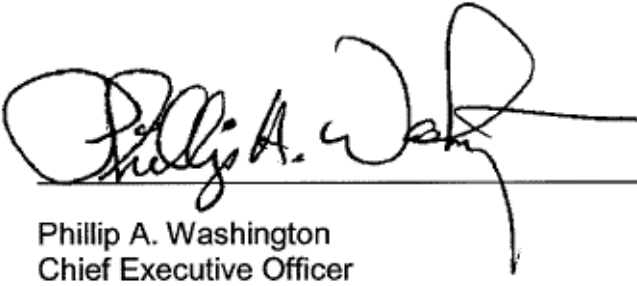
Staff will report on milestones achieved on individual Equity Platform actions on an ongoing basis, as appropriate.

### **ATTACHMENT**

Attachment A - Equity Platform Summary and Objectives

Prepared by: Therese W. McMillan, Chief Planning Officer, (213) 922-7077

Reviewed by: Phillip A. Washington, Chief Executive Officer, (213) 922-7555



Phillip A. Washington  
Chief Executive Officer



# Metro Equity Platform Framework

## Summary and Objectives



# Metro Equity Platform Framework

Access to opportunity: a core concept to public decision-making, public investment, and public service

- Vast disparity exists in LA County among neighborhoods and individuals:
  - To seize opportunity – jobs, housing, education, health, safety;
  - To improve their circumstances to do so.
- Transportation is an essential lever to enable that access.

# Metro Equity Platform Framework

## Why an Equity Platform now?

- As a transportation leader, Metro can and should address disparities.
- Metro has already signaled a change:
  - Measure M: performance metric considerations
  - New Long Range Transportation Plan committed early to Equity
  - Recent, targeted community collaborations (First/Last Mile, Rail to Rail grant effort)
- Exploratory outreach to LA County equity thought leaders



# Metro Equity Platform Framework

Multi-point Equity Platform is built on four pillars:

**I. Define and Measure**

**II. Listen and Learn**

**III. Focus and Deliver**

**IV. Train and Grow**

# Metro Equity Platform Framework

## I. Define and Measure

Need a common basis to build an equity agenda.

- “Equity” holds different perspectives and priorities for many.
- Inequity → fundamental differences in access to opportunity
- Race and Class—historically and currently—predominate disparities in LA County
  - Concentrated in poor, minority communities
  - Age, gender, disability, and residency also can expand or constrain opportunities



# Metro Equity Platform Framework

## I. Define and Measure (cont.)

- Pursue an inclusive conversation that commits to:
  - Establish meaningful goals around a shared definition of equity – and actions to achieve those goals;
  - Define metrics to evaluate outcomes, including investment decisions;
  - Ensure consideration at the front end, not the back end;
  - Seek out and involve the diverse range of voices that must collaborate on above.

# Metro Equity Platform Framework

## II. Listen and Learn

Establish comprehensive, multiple forums to engage the community meaningfully and actively in defining, measuring and acting on equitable outcomes.

- Open the conversation with LA's community members to address:
  - where achieving equity has been problematic — broadly, and specific to transportation;
  - where improved relationships, partnerships and actions can advance more equitable transportation outcomes going forward.

# Metro Equity Platform Framework

## II. Listen and Learn (cont.)

- Recognizing past experience provides foundation for a different future.
- Community-driven conversation is essential.
  - Seek best practices.
  - Establish distinct advisory body for the equity agenda.
  - Engage CBOs in community outreach and problem solving.
  - Build local government technical capacity serving historically underserved communities

# Metro Equity Platform Framework

## III. Focus and Deliver

The Long Range Transportation Plan is unifying activity with 2 major crosscutting Equity arenas:

- Where Metro Leads
  - Transportation planner, operator, builder and funder;
  - Performance-based investment decisions that:
    - a) advance outcomes to promote and sustain opportunities;
    - b) avoid outcomes that aggravate disparities in opportunity;
  - Operating/maintaining the system impacts opportunity as much as infrastructure investments.



# Metro Equity Platform Framework

## III. Focus and Deliver (cont.)

- Where Metro Partners
  - Beyond Metro's core transportation responsibilities—Housing, Public Health, Economic Development
  - Example: Gentrification/displacement/affordable housing
    - An urgent issue in every corner of the county
    - Metro cannot address alone—Partners are essential: local government, business, community advocates, foundations

# Metro Equity Platform Framework

## IV. Train and Grow

A new equity agenda requires “top-to-bottom” ownership throughout the agency.

- Training in two important areas:
  - Methods to evaluate equity including data collection, measurement and analysis;
  - Approaches to effectively communicate and work with communities with priority and respect for equity issues.

# Metro Equity Platform Framework

## Next Steps

- The Equity Platform is a framework.
- It intends to shape specific analyses and actions going forward.
- Experience may redirect and improve the platform.
- The Policy Advisory Council (PAC) is an essential touchstone for input and checkpoint for progress.
- Presentations to the Metro Board are key.



Thank you



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Los Angeles County Metropolitan Transportation Authority



# Metro Equity Platform Framework

Fiscal Year 2019 Activation Plan



# Metro Equity Platform Framework

Access to opportunity: a core concept to public decision-making, public investment, and public service

- Vast disparity exists in LA County among neighborhoods and individuals:
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  - To improve their circumstances to do so.
- Transportation is an essential lever to enable that access.

# Metro Equity Platform Framework

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- Exploratory outreach to LA County equity thought leaders

# Metro Equity Platform Framework

The Platform is not any single task that will be “finished”. Instead, the Platform is:

- A vehicle to inform, shape and guide all lines of the agency’s business on a continuing basis
- A commitment to incorporate Equity principles and pursue equitable outcomes
- A paradigm that will help identify and implement projects or programs that close or eliminate disparities in access to opportunity
- A set of outcomes driven by access needs and not merely a calculated geographic distribution



# Metro Equity Platform Framework

Multi-point Equity Platform is built on four pillars:

- I. Define and Measure
- II. Listen and Learn
- III. Focus and Deliver
- IV. Train and Grow

# Metro Equity Platform Framework

## I. Define and Measure

Defining “equity” and matching with performance metrics. Efforts include:

- Work with the Policy Advisory Council to define “opportunity gaps” and related performance metrics as part of the Long Range Transportation Plan (LRTP)
- Construct and apply equity-driven performance metrics in key Metro initiatives:
  - LRTP process to develop guide for identifying equity concerns and solutions
  - NextGen Bus Study
  - Equity Assessment section in all Planning Board Reports

# Metro Equity Platform Framework

## II. Listen and Learn

Establishing a connection between Metro and the Los Angeles County community. Efforts include:

- New partnerships with Community Based Organizations (CBOs):
  - Blue Line, First/Last Mile Plan lessons learned
  - Communications Dept policy on CBO partnerships
  - Staff have engaged community members on safety and security concerns raised by riders
  - Agency is serving as Transportation Working Group co-chair of the South Los Angeles Promise Zone (Slate Z)
- Community-driven collaborations led by the Policy Advisory Council



**Metro**

# Metro Equity Platform Framework

## II. Listen and Learn (cont.)

- Evaluating and establishing Equity Advisory avenues
  - Assigning the Policy Advisory Council and its associated networks a technical advisory role
  - Developing a “Blue Ribbon Commission” or similar forum to draw Equity thought leaders from LA County to advise on specific topics (housing/displacement, public health, community safety and security)
  - Actively participating in local and national forums to address equity challenges and increase exposure to best practices

# Metro Equity Platform Framework

## IV. Train and Grow

Top-to-bottom commitment from within Metro to understand, embrace and maximize equity advancement. Efforts include:

- Senior- and executive-level training program in racial equity
- Trainings and seminars geared to Metro-related focus areas in collaboration with philanthropic foundations
- Workshop on technical best practices for equity measurement and analysis

# Metro Equity Platform Framework

## III. Focus and Deliver

Implementing actions and programs that carry out the Platform. Efforts include:

- NextGen Bus Study
- Women and Girls Governing Council
- LRTP
- Assistance to Disadvantaged Business Enterprise/Veterans Business Enterprise firms
- Career Pathway initiatives, including Transportation School
- Potential consultant assistance to resource-challenged local jurisdictions in Los Angeles County

# Metro Equity Platform Framework

## Next Steps

- Staff will report on milestones achieved on individual Equity Platform actions on an ongoing basis



Thank you





# Rapid Equity Assessment

**The Challenge Ahead:** The COVID-19 Pandemic has highlighted racial and socioeconomic disparities in our health care, economic, and transportation systems. While anyone can contract the virus, it has disproportionately impacted and threatened the lives of black, Latinx, and low-income communities. Due to systemic inequities, these communities are more likely to have underlying health conditions, have poorer access to health care, be essential workers who cannot work from home, have limited access to digital tools for continuing education and telecommuting, and rely on public transit for essential trips. **Metro’s response to the COVID-19 crisis presents an opportunity to help prevent the same disparate results and further widening of the gaps shaped by existing racial and economic disparities.**

**Equity in a Time of Crisis:** By rooting our decision making in equity, we can ensure that historically marginalized communities, and other groups that have been disproportionately impacted by COVID-19, are not left behind as we respond to this public health crisis and as we recover. We must understand the potential impact of our decisions for those faring the worse in order to truly improve conditions for all of our customers, front-line Metro family, and the broader Los Angeles County community.

**Using the Assessment:** This Rapid Equity Assessment tool was developed to assist Metro staff in identifying and prioritizing equity opportunities. All questions should be answered to the best extent possible before a decision is made. If you answer no to questions one or two, or cannot identify burdens under question three, please contact your Department’s Equity Liaison immediately for assistance. The Assessment should be completed by a diverse group within the project team, including staff with a variety of experiences, knowledge, backgrounds, and skillsets. The completed form should be emailed to the *Office of Equity and Race*, copying your Department’s Equity Liaison, for review and potential follow-up. A summary of your assessment should be included in any report, including a board report, board box, or other document explaining the decision or recommendation. Email your Department’s Equity Liaison for assistance in using the tool.

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**Proposed Action:** Click or tap here to enter text.

**Team Members:** Click or tap here to enter text.

**1. Will the decision being made impact any of the following groups? (If no, skip to number 2.)**

- |   |   |
|---|---|
| <input type="checkbox"/> Historically marginalized communities<br>(Communities of Color, Limited English Proficiency, Avg. incomes < \$35K) | <input type="checkbox"/> Older adults (Over 62 years old)   |
| <input type="checkbox"/> Equity Focused Communities (See the map on page 2)   | <input type="checkbox"/> People with disabilities   |
|   | <input type="checkbox"/> Individuals with chronic medical conditions                                |
|   | <input type="checkbox"/> Disadvantaged Business Enterprise or Disabled Veterans Business Enterprise |

**2. Could this present an equity opportunity? (Yes or No)**

*An “Equity Opportunity” is a decision that is designed to enhance positive impacts or reduce negative impacts for historically marginalized communities or others most likely to be impacted by COVID-19.*



# Rapid Equity Assessment

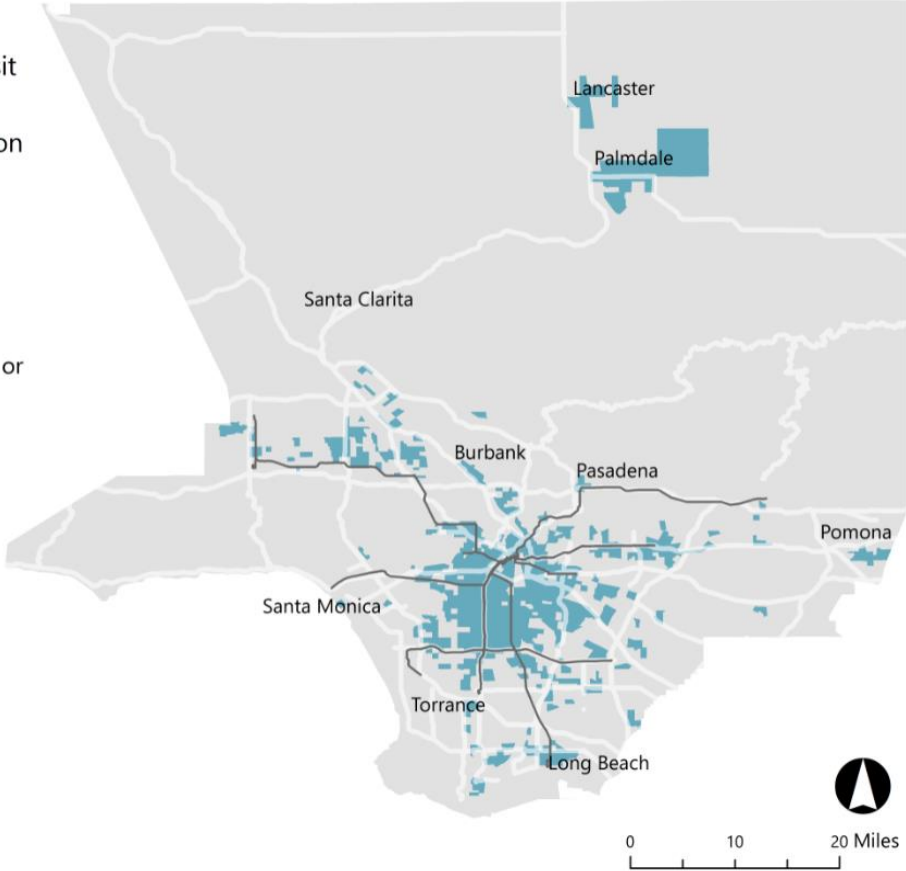
## Equity Focused Communities Map

- Highways
- Fixed guideway transit
- EFC Communities  
30% of LAC Population

Census Tract Thresholds

- > 40% Low Income
- > 80% Non-white
- > 10% Zero Car

\*Thresholds are based on:  
1) Non-white AND Low Income, or  
2) Low Income AND Zero Car





# **Equity and Race Program Update**

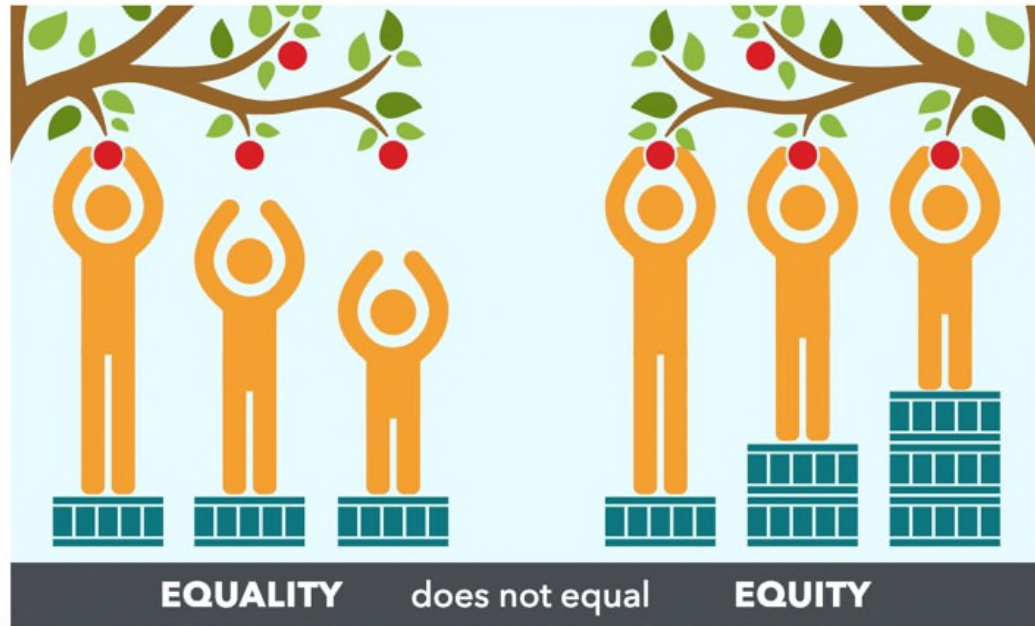
## Executive Management Committee



# METRO EQUITY PLATFORM FRAMEWORK

- Board Approved as of March 2018
- Core Objective:
  - Increase access to opportunity
- Four Pillars
  - Define and Measure
  - Listen and Learn
  - Focus and Deliver
  - Train and Grow

# WHY EQUITY?



# WHY EQUITY?



Source: Matt Kinshella from Meyer Memorial Trust and Northwest Health Foundation Competition

# WHAT IS EQUITY?

Equity is both an outcome and a process to address disparities to ensure fair and just access to opportunities.



# ADVANCING EQUITY

## ❖ Create Equitable Processes

- ❖ Best Practices
- ❖ Equity Tools
- ❖ Community Engagement

## ❖ Build Capacity

- ❖ Office of Equity and Race
- ❖ Equity Liaisons

# WHAT'S NEXT

- ❖ Equity Section in Board Reports
- ❖ Agencywide Assessment and Strategic Plan
- ❖ JEDI Book Club
- ❖ Equity Training for Staff