



## Board Report

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Agenda Number: 16.

### PLANNING & PROGRAMMING COMMITTEE JUNE 16, 2021

**SUBJECT: COMMUNITY BASED ORGANIZATION PARTNERING STRATEGY**

**ACTION: RECEIVE AND FILE**

#### **RECOMMENDATION**

RECEIVE AND FILE status report on Community Based Organization Partnering Strategy: Elements for Successful Partnering in Professional Services (Attachment A).

#### **ISSUE**

Staff developed Metro's "Community Based Organization Partnering Strategy: Elements for Successful Partnering in Professional Services," a set of recommendations that establishes consistent and equitable processes for Metro to utilize across the agency when directly or indirectly engaging Community Based Organizations (CBOs) for professional services.

#### **BACKGROUND**

Research has shown that vast disparities exist in Los Angeles County among neighborhoods and individuals that make it difficult to seize opportunities in jobs, housing, education, health, and safety to improve their circumstances. Metro recognizes that transportation plays an important role in addressing these issues and that opportunities should be a core concept to public decision-making, public investment, and public service. That is why in 2017, the Metro Board of Directors passed the Metro Equity Platform Framework to illustrate Metro's commitment to advancing equity and for Metro to actively lead and partner in addressing and overcoming these disparities. To align with Metro's Equity Platform Framework, Metro's Transit Oriented Communities: First/Last Mile unit in 2017 procured a consultant team, that included CBOs, to assist with walk audits and community engagement needed for the First/Last Mile Blue Line Project.

The integration of CBOs as Metro's partners in engagement rather than targets of outreach represented a departure from the standard approach, both for Metro and the CBOs. This partnership allowed for a more robust and inclusive engagement and trust in the community, ultimately making it a model approach for future projects. Metro has historically partnered with CBOs in a variety of ways and on various subjects ranging from arts and culture to workforce development. Metro knows that CBOs bring forth unique skillsets in community engagement and education and provide specialized services to constituents that Metro may not always be able to reach. CBOs often have longstanding relationships with constituents they serve and an established level of trust essential to bring

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historically vulnerable and marginalized community members to the table. These unique relationships with their constituents strengthen community engagement strategies by filling in the gaps where Metro may not be able to connect. Additionally, CBOs often bring forth a unique skillset at engaging these populations through decades of relationship building that differ from that of small businesses and other consultants who work for Metro. CBOs are different from smaller businesses in that they are often rooted in community-centered values and missions that extend beyond the provision of professional services to the agency.

Despite acknowledgement of the value of working with CBOs, Metro has approached CBO partnering in different ways, creating inconsistencies, and in some cases inequities in CBOs' access to information and contracting opportunities. Existing processes can also be taxing for some CBOs to navigate, especially depending on their legal structure, revenue streams, or if they have relationships or engagements with multiple Metro departments. To support and improve Metro's CBO partnering efforts and allow replication of the successful FLM Blue Line model, Community Relations and the Countywide Planning & Development Department set out to develop a strategy to enhance Metro's ability to meaningfully and effectively partner and ease the process of partnering for CBOs.

In 2019, CAUSEIMPACTS, a consultant firm, was selected to assist in the agency's development of a strategy with the goals to:

- Create clear and equitable structures, strategies, and policies for CBO partnership that the entire Metro agency can utilize and implement consistently across departments and situations.
- Develop multi-tiered CBO Partnership Strategy that outlines various categories of CBO partnership and engagement and how and when to compensate CBOs for their efforts and expertise.
- Create a network of CBOs that are prepared to do business with Metro.
- Create tools and prepare Metro staff to implement the final CBO Partnership Strategy.
- Build CBOs capacity to do business with Metro.

## **DISCUSSION**

The CBO Partnering Strategy: Elements for Successful Partnering in Professional Services (CBO Partnering Strategy) was an interdepartmental effort that was co-led by Community Relations, Countywide Planning & Development, and the Office of Equity and Race. The CBO Partnering Strategy was informed by a four-phased process that included best practices research, strategy development, vetting the recommendations with stakeholders, and finalizing the strategy and developing implementation tools.

The CBO Partnering Strategy was informed by a series of 35 interviews with Metro employees, focus group meetings/interviews with 18 individuals representing 16 CBOs, and two surveys with Metro staff and CBOs that collected over 105 responses combined, six meetings with an Internal Metro Working Group comprised of the key departments that would have a critical role in implementation, and two CBO engagement meetings where CBOs had an opportunity to provide feedback on the draft strategy.

The CBO Partnering Strategy (Attachment A) is a living document that responds to an existing need

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for Metro to define and deploy a clear, consistent, and equitable approach to partnering with CBOs on professional services.

### CBO Definition

For the purposes of the CBO Partnering Strategy, CBOs are defined as *an organization with a mission to improve the environmental, economic, social, cultural and/or quality of life conditions of a common community of interest*. In the CBO Partnering Strategy, the term “organization” is broadly interpreted and can encompass groups with formal legal status and unregistered groups, such as block clubs, or other groups that may not have a legal designation yet are still organized to work on collective efforts to benefit their community. Metro can only compensate CBOs with legal status (for example, 501c3 status).

### Recommendations

The CBO Partnering Strategy includes seven recommendations that are organized by two categories; internal facing actions that Metro can take to facilitate CBO partnering and activities that will build CBO capacity to partner with Metro. The seven recommendations include:

- 1. Central Lead** - Identifying one department that will be responsible for implementation, convening other Metro departments, interfacing with CBOs and monitoring success was found to be a critical element of a successful strategy. The Office of Equity and Race is the Central Lead for the CBO Partnering Strategy implementation.
- 2. CBO Database/Portal** - Creating and maintaining a searchable centralized database/portal of CBO partners to consolidate CBO contact information, ensure uniform and consistent communication, provide a platform to track CBO relationships, and a method to promote equitable inclusion.
- 3. Assessment Checklist for Compensation** - Developing a tool for Metro staff to better understand the value CBOs provide and identify when a level of work that Metro is requesting of a CBO should be considered for compensation.
- 4. Internal Library of Resources** - Creating and maintaining a library of materials for Metro staff that could include scopes of work, agreements, evaluation criteria, and other similar materials to ensure that Metro staff are able to build from work that has been done to date as new CBO partnerships are realized.
- 5. Chartering Process** - Developing and implementing an intentional onboarding exercise between Metro staff, consultants, and CBOs to ensure that areas of shared values, mission alignment, norms for working through areas of disagreement and conflict resolution are addressed at the beginning of the process.
- 6. Training Metro Staff to Partner Effectively** - Developing and implementing a series of training modules for Metro staff to build staff awareness and capacity on the value of working with CBOs and how to partner with CBOs most effectively.
- 7. Building CBO Capacity** - Leveraging existing Metro programs and training and building CBO capacity to partner with Metro, fostering collaboration between consultants and CBOs, exploring strategic partnerships with umbrella organizations that can support smaller CBOs in traversing the complexity of public sector administration and contracts, and continuing to collaborate and engage with other public agencies on CBO partnering efforts to continue to

learn and improve Metro's efforts.

### Implementation

The CBO Partnering Strategy will be implemented by the Office of Equity and Race. Next steps for implementation include working with Transit Center and Center for Neighborhood Technology to develop a pilot CBO Database, piloting elements of the CBO Partnering Strategy with CBOs on Metro projects, launching a training series for CBOs on how to partner with Metro, developing an Implementation Working Group, and building a library of resources for partnering with CBOs.

### **FINANCIAL IMPACT**

Implementation of the CBO Partnering Strategy will in some cases involve shaping and adjusting the direction of current projects within existing budgets. In other cases, it will require new activities and program development. Where an implementation action requires new revenues, a separate budget action would be taken. Each project team will need to ensure the staff infrastructure and sufficient resources to support CBO Partnering Strategy implementation activities.

### Impact to Budget

There is no impact to the existing extended FY21 budget as a result of this Receive and File.

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

This recommendation supports strategic plan goals #3.3 and 4.1 by helping Metro collaborate with the public and foster trust with everyday stakeholders in its planning processes while creating opportunity for robust community engagement opportunities that reflect the communities Metro serves.

### **NEXT STEPS**

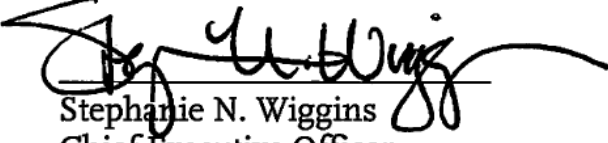
The Office of Equity and Race will continue implementing the CBO Partnering Strategy by advancing CBO database pilot with Transit Center and Center for Neighborhood Technology, executing the training series for CBOs on how to partner with Metro, developing the Implementation Working Group, and building the library of resources for Metro staff on how to partner with CBOs.

### **ATTACHMENTS**

Attachment A - CBO Partnering Strategy: Elements for Successful Partnering in Professional Services

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