



Board Report

File #: 2022-0490, **File Type:** Informational Report

Agenda Number: 17.

EXECUTIVE MANAGEMENT COMMITTEE FEBRUARY 16, 2023

SUBJECT: METRO EQUITY PLATFORM UPDATE

ACTION: RECEIVE AND FILE

RECOMMENDATION

RECEIVE AND FILE a status report on implementation of the Metro Equity Platform.

ISSUE

This report provides an update on progress and activities conducted by Metro between February 2021 to February 2023 to implement the agency's Equity Platform framework.

BACKGROUND

Metro's Equity work is based on the Board approved Equity Platform (Attachment A), which provides a framework that guides how the agency works to address inequities and create more equitable access to opportunity through four main action areas. These areas are called the pillars of the Equity Platform: 1) Define and Measure, 2) Listen and Learn, 3) Focus and Deliver, and 4) Train and Grow. The platform is not a singular task or process that will be completed but rather an agency commitment to incorporate equity into all facets of Metro's decision-making and budget allocation and genuinely engage impacted communities in our processes while continuously pursuing equitable outcomes in everything we do.

Metro defines equity as 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.

Metro's Office of Equity and Race (OER) was established in January 2020 to foster the institutionalization of equity in the agency programs, policies, services, and processes. OER works with departments throughout the agency to develop and socialize tools that help identify and address inequities through the budget, planning, and governance processes; implement policies to expand partnerships with community organizations and improve public participation; and provide educational

programming for staff and strategic project advising, all with a focus on building systemic change that leads to equitable outcomes.

DISCUSSION

Updates on the Metro's progress implementing the Equity Platform over the last two years are outlined below:

OER Team

During the 2021 agency reorganization, OER joined the newly formed Office of Civil Rights, Racial Equity, and Inclusion (OCRREI), which is part of the Office of the Chief of Staff. Since then, OER has hired two new staff members that are critical to implementing the work detailed below.

Define and Measure: Defining and Assessing Inequities

Under the Define and Measure pillar, staff has continued to develop tools and processes to help Metro staff understand the benefits and burdens of our services, programs, and policies, how disparities and gaps in opportunities shape them, and how we can make decisions to foster more equitable outcomes.

Board Report Equity Platform Section

In 2021 the CEO instituted a required equity assessment called the Equity Platform section for all board reports brought to the Metro Board, starting in July 2021. Beginning in June 2021, staff developed a protocol and guidance materials, including a recorded training, a refreshed version of the Metro Rapid Equity Assessment (REA) tool, and FAQ sheets for all agency departments to follow this new directive. The Equity Platform section was the first agencywide rollout of equity assessments and tools universally applied to an existing Metro process. Nearly all reports are reviewed by at least two OER staff members to ensure a robust equity analysis.

Equity Information Hub

Through close collaboration with all Metro departments, staff continues to identify needs and resources that support Metro staff in building equity fluency under the Define and Measure pillar. As a result, staff has been working closely with ITS, Customer Experience, and Design Studio to build an Equity Information Hub (EIH) that: (1) creates a centralized point of access for equity-related data and information; (2) supports the implementation of Metro's equity tools and project or program management; (3) tells part of Metro's "equity story," and (4) encourages engagement through publicly accessible content.

The first phase of the EIH launched in January 2023. The site, now a beta prototype, includes equity data, maps, analysis applications, and other information that was formerly decentralized. Staff has created a public view and a staff-only view using credentialing features. Members of the public can quickly access items such as the Equity Focus Communities Map, the Advisory Bodies Demographic Data Dashboard, the Community-Based Organization Partnering Strategy Report, and case studies demonstrating how Metro implements equity in projects and plans. Staff can access additional items, such as templates and training materials to implement Metro's Equity Toolkit, such as the Rapid Equity Assessment or the Equity Planning and Evaluation Tool. The EIH can be accessed at

[metro.net/equityhub <https://equity-lametro.hub.arcgis.com/>](https://equity-lametro.hub.arcgis.com/).

In developing Phase 1 of this cross-departmental effort, OER has worked collaboratively to implement concurrent policies and priorities of the agency, such as the User Experience (UX) Testing Policy. Staff conducted four UX Testing Sessions between September and December 2022 with representatives from different Metro departments, the Equity Liaisons Working Group, Metro Advisory Body Members, and partner public agencies, such as CalTrans and LA County. In early February 2023, staff conducted two additional UX Testing Sessions with accessibility stakeholders to further enhance the site's usability for all customers. The sessions served as opportunities to receive feedback as the site was being developed, thereby making it more tailored to the needs of different users and stakeholders. The second phase of the EIH will include new analyses and related tools. Staff anticipates the development of baseline access to opportunities maps and an EFC Toolkit of Overlays to be part of this work in FY24.

2022 Equity Focus Communities Update

Over the last year, staff updated the Equity Focus Communities (EFC) definition and maps, which were first developed in 2019 as a way to define communities most in need of mobility investments. The update used the most recent demographic data for Los Angeles County, implementing an index methodology, and setting a three-year update cycle going forward. Metro's Executive Management Committee (EMC) received the 2022 EFC update (File # 2022-0275) at their May 2022 meeting. Data and maps for the 2022 EFC Update are now available for agency use and the public to view and are centralized in the [EFC Dashboard \[metro.net/efcdashboard <https://experience.arcgis.com/experience/738dfea5936f47e09443f810e0d59647/>\]](https://experience.arcgis.com/experience/738dfea5936f47e09443f810e0d59647/). Since late June, staff has provided meetings, training, and other communications to inform the agency and external partners of and provide support for the utilization of the 2022 EFC definition and maps.

Equity Focus Communities Budget Assessment

In response to direction from the Board in August 2022, staff developed the EFC Budget Assessment tool to measure expenditures in Metro's budget allocated to benefits for EFCs. Starting with the approved FY23 budget, staff categorized Metro expenditures into one of the following categories: EFC Benefits (Targeted or Indirect), No EFC Benefits, Formula-Based Investments, or Administrative/Technical Support. Staff presented these baseline findings to the board (File # 2022-0736), which illustrated approximately 67 percent of the FY23 budget was invested in EFC Benefits (approximately 26 percent of which were Targeted Benefits). Entering the FY24 EZBB process, staff will use this baseline to identify opportunities to increase or sustain these Benefits percentages. FY24 EFC Budget Assessment calculations are scheduled for Spring 2023 after FY24 budget submissions have been finalized.

Metro Budget Equity Assessment Tool (MBEAT)

Since the FY21 Mid-Year budget, the MBEAT has been used to assess the equity and impacts of Metro's budget. The MBEAT form has consisted of a series of questions to identify (1) both anticipated and potential impacts from budget requests on EFCs, marginalized groups, and vulnerable communities, (2) equity considerations in budget planning and project implementation, (3) mitigation and harm reduction strategies, and (4) methods to track impacts after budgets have been allocated. Each fiscal year MBEAT implementation has adjusted to meet the evolving annual budget process, incorporating capital projects in FY22 and supporting the FY23 Equitable Zero-Based

Budgeting (EZBB) process with a semi-automated digital form, MBEAT user guide, and technical integration into Metro's online budget submission program. Staff presented summaries of the MBEAT process to the Board for both the FY22 and FY23 budget cycles (File # 2021-0239, # 2022-0243). The MBEAT has been further refined for the FY24 EZBB process, and staff will share further updates in the coming months.

Listen and Learn: Equitable Community Engagement

Metro is working to improve its efforts to listen and learn from the communities that we serve. Community-driven conversations are essential, but they require trust. For Metro to build trust, the agency must intentionally collaborate and listen to community experiences. Metro continues to work to show how community input informs and shapes our decisions, actions, and investments.

Advisory Body Compensation Policy

Over the spring and summer of 2021, staff led the development of Metro's Advisory Body Compensation Policy (ABC Policy), which determines if and when members of the public who serve on Metro advisory bodies can be compensated. The Metro Board adopted the ABC Policy in September 2021 and amended it in May 2022 to clarify policy implementation and facilitate a consistent method for collecting demographic information on advisory body membership. Since its adoption, staff has guided and tracked policy implementation. To date, all members of the 16 advisory bodies that have opted to receive compensation under the policy have begun receiving payment. Additionally, staff have collected demographic information on 64 percent of the members and have visualized the information via PowerBI dashboard that will be available on the EIH. See "Attachment B" for a demographic profile of Metro's advisory bodies. This data highlights areas for improved representation across gender, race/ethnicity, and income brackets and positions Metro to track and strive for more equitable demographic representation on its various advisory bodies. Later this year, once launched, the East San Fernando Valley Community Leadership Council will join the list of eligible advisory bodies under the policy.

Metro Budget Outreach

Metro has continuously worked to increase public engagement with the agency's annual budget development process, including hosting at least three telephone town halls each year, revitalizing the annual online budget survey, and translating the budget survey into eight non-English languages. Further, the agency tracks respondent-provided demographic identities, including respondents living in EFCs, to ensure participation in the annual budget survey is representative of our customers and Los Angeles County as a whole.

Community-Based Organization (CBO) Partnering Strategy

in June 2021, staff finalized the CBO Partnering Strategy: Elements for Successful Partnering in Professional Services (Attachment C). The Strategy is 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.

Since June 2021, staff has provided two trainings to build agencywide awareness, know-how, and capacity for working with CBOs, as well as two trainings to build CBO knowledge about the Metro procurement process and opportunities to partner with Metro. There will be additional trainings this

year. Staff also supported various project teams with procuring, onboarding, and managing new CBO partnerships, including the Offices of Sustainability and Community Relations who successfully partnered with two CBOs to develop and deploy an Environmental Justice Training series for all Metro staff, and the Vermont Transit Corridor project team who worked with CBOs to engage community members on the future of the corridor, resulting one of the largest CBO Partnership engagements in Metro's history (File # 2022-0416). Finally, in late 2021, OER and ITS began working with the Center for Neighborhood Technology, Transit Center, and six local CBOs to build a searchable centralized database/portal of CBO partners to consolidate CBO contact information, provide a platform to track CBO relationships and a method to promote equitable partnering opportunities and to ensure uniform and consistent communication. The CBO database is expected to launch in the summer of 2023. As implementation continues, staff is working to build a library of resources, including templates, guides, and other helpful information to support the database rollout and future CBO partnerships.

Focus and Deliver: Decision-Making and Project Support

The Focus and Deliver pillar centers needs-based analyses to plan, build, invest and operate in a manner that removes barriers and supports increased access to opportunity for all. Additionally, this pillar recognizes Metro's role as a partner in advancing equitable outcomes in issues such as housing, public health, and economic development.

Equity Planning and Evaluation Tool

In 2021, staff developed the Equity Planning and Evaluation Tool (EPET) to enhance the agency's processes and help ensure equitable outcomes. The EPET is a six-step guide that can be used throughout all phases of a capital project or major initiative, and the questions in each step are designed to create equity checkpoints during a process. The six steps of the EPET are: (1) Connect Community Results to Project Outcomes; (2) Analyze Data; (3) Engage the Community; (4) Plan for Equitable Outcomes; (5) Proposal Implementation; and (6) Evaluate, Communicate, and Stay Accountable. Metro staff are encouraged to collaborate with technical consultants, agency partners, stakeholders, and community members to ensure that the diversity of viewpoints, backgrounds, and experiences is considered. This tool has been in the pilot phase in the past year and a half, with several projects within the agency testing its usability and impact. One notable case study is the Long Beach - East LA Corridor Mobility Investment Plan (formerly titled I-710 South Corridor Task Force).

Measure M Five-year Assessment and Equity Report

At the request of the CEO, staff began developing the *Measure M Five-year Assessment and Equity Report* to comply with ordinance and guidelines requirements to assess Measure M progress in its first five years and track subsequent quality of life and equity impacts. After a competitive solicitation process, the project kicked off with the awarded firm in June 2022. The report will be approaching data collection and analysis through an equity lens, utilizing a people-first framework, illustrating major changes both internal (leadership and agency transitions) and external (COVID-19 pandemic, new funding streams) to Metro. Staff and the consultant team will present proposed objectives and criteria for the report to the Board and are scheduled to complete a final report and return to the Metro Board in Spring 2023.

Policy and Legislative Influence

In the past two years, staff has reviewed and provided recommendations on various items, such as

the U.S. Department of Transportation (USDOT) Justice40 Initiative, the U.S. Council on Environmental Quality's Climate and Economic Justice Screening Tool, the Federal Transit Administration (FTA) Request for Information Concerning the Capital Investment Grants, the SB 1 Competitive Programs Equity Supplement and individual SB 1 Competitive Program evaluation criteria, and California Senate Bill 1161: Transit operators: street harassment plans (Min). Additionally, when the board considered the program of projects for cycle 6 of the Transit and Intercity Rail Capital Program (TIRCP), staff recommended and the board approved a program that prioritized a project that serves equity focus communities. That project successfully secured \$600M this cycle.

Equity Implementation Highlights and External Partnerships

Staff is working to more intentionally apply an equity lens to Metro's work, grapple with internal and external equity related challenges, and support targeted community engagement with marginalized communities. Staff across the agency have collaborated and applied Metro equity tools to develop and refine policies and programs, including Metro's Fostering an Inclusive Culture Policy, Code of Conduct, LA28 Mobility Concept Plan, Objectives for Multimodal Highway Investment, the triennial Title VI Update, WIN-LA, and incorporating cultural competency criteria into major planning and construction contract solicitation materials. To help advance equity beyond Metro, staff have also served on or worked closely with external working groups, including the Aging and Disabilities Transportation Network (ADTN), South Los Angeles Transit Empowerment Zone (SLATE-Z), California Transit Association Inclusion, Diversity, Equity, and Access (IDEA) Task Force, and LA County WHAM Committee, which supports the coordination and implementation of Measures W, H, A, and M. Through these efforts staff provide strategic advising and thought partnership to support inclusive planning and implementation efforts and build relationships that support Metro's work.

Train and Grow: A Culture of Learning

This pillar focuses on Metro as an organization. It recognizes that successful implementation of the Equity Platform requires commitment, education and training, and prioritization of the pillars across Metro at all levels and in all departments.

Equity Liaisons

In June 2020, staff established the Equity Liaisons Working Group, which includes representatives from each Metro department to serve as liaisons for 18-24-month terms. The goal of the Equity Liaison Working Group is to build an internal team of equity fluent leaders to help Metro advance equity. In May 2022, the inaugural Equity Liaisons cohort of 18 members completed their term and joined the incoming cohort for their first meeting to share lessons learned and offer guidance. This year's cohort is comprised of 28 members.

As we strive to create a more equitable and inclusive agency, Equity Liaisons serve as ambassadors to Metro departments by learning to talk about race, racial justice, and equity and sharing their knowledge with others so that they may use those tools in their daily work. They are instrumental in the MBEAT implementation, support the development of equity sections for board reports, and help roll out and implement other equity-related initiatives and tools. For example, the current Equity Liaisons provided feedback on the Equity Information Hub as the project neared its launch. Metro Equity Liaisons continue to meet twice a month, discussing books, articles, and videos and engaging in activities to help expand their understanding of disparities and systemic inequities in the context of

Metro's work and ways to support a more equitable future.

Equity 101/102 Staff Training Series

The Equity Staff Training Series aims to increase equity fluency among all Metro staff and improve the collective application of equity concepts and principles to different components of Metro's work.

The Equity 101 training will be a recorded, interactive, and industry-leading training video required for all Metro staff. The Equity 102 training shall be live and targeted to Metro senior leadership, program and project managers, and Metro employees interested in deepening their understanding of Metro's equity work and exploring solutions that address disparities in access to opportunities. The equity training series will build off Metro's Equity Platform and the agency's existing mandatory Unconscious Bias and Sexual Harassment staff trainings. Since the CEO directed all new and existing staff to complete the Unconscious Bias training in July 2021, the training has a 95.7 percent completion rate (as of January 17, 2023). A majority of non-compliant employees are newly hired employees who have 90 days to complete mandatory staff trainings.

Metro looks forward to continuing to build the equity capacity of all Metro departments and work towards equitable outcomes as we operationalize equity across all facets of the organization.

EQUITY PLATFORM

Metro's Office of Equity and Race (OER) is working to foster agencywide institutionalization of equity with each program and project it leads or supports and each process or outcome it influences. The impact and benefit of this work for marginalized and vulnerable communities has, and will, be reflected in Metro's progress over time.

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 platform 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 continue reporting on milestones achieved on agency equity actions and provide overall updates on an ongoing basis, as appropriate.

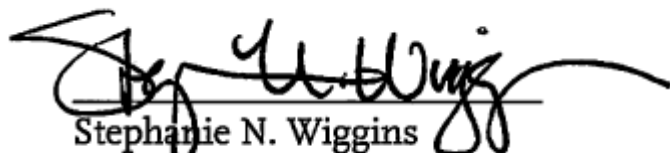
ATTACHMENTS

Attachment A - Equity Platform Overview
Attachment B - Advisory Body Member Demographics
Attachment C - CBO Partnering Strategy

Prepared by: Jessica Medina, Manager, (213) 503-8791

Hector Gutierrez, Manager, (213) 444-9304
Naomi Iwasaki, Senior Director, (213) 922-3085
KeAndra Cylear Dodds, Executive Officer, (213) 922-4850

Reviewed by: Nicole Englund, Chief of Staff, (213) 922-7950



Stephanie N. Wiggins
Chief Executive Officer