



Racial Equity Roadmap User Manual

By

Adapted from Kenya Budd, Office of Equity and
Human Rights
and the Citywide Equity Committee, for the
Portland Housing Bureau partners



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INTRODUCTION AND ACKNOWLEDGEMENTS

The Portland Housing Bureau is striving to do its part to bring equitable access and outcome for Portland residents. Our partners are key in the delivery of an equity agenda. This manual is adapted from the City of Portland's Equity Roadmap Project. It is our guide to you for using the Equity Road Map Assessment and Planning tool. We are deeply grateful to the work of the Office of Equity and Human Rights, the City of Portland Citywide Equity Committee, and the Coalition of Communities of Color. We could not have provided this guidance without their work and generosity in making it available to our partners.

WHY RACIAL EQUITY?

A focused effort to address persistent racial disparities allows the City of Portland to make more significant progress than if we were to address disparities across multiple identity lines simultaneously. Racially equitable programs, policies, and practices benefit all, not just people of color.

Context: While Portland may consider itself a fair and just city, people of color within the City of Portland continue to fare worse than their white counterparts in every area; housing, employment, education, justice, and health. The City of Portland has not made significant changes for employees or residents of color despite years of effort.

Because the City has a unique responsibility to all residents, these racial inequities must be addressed. Research into the persistent inequities indicate that we must go beyond individual, intentional prejudices and examine government institutions. We must investigate, honestly, how our longstanding systems, policies and practices unintentionally support racial inequity, and change them. From this determination, the City - assisted by the Portland community - created the Office of Equity and Human Rights in 2012.

OEHR has been tasked to focus specifically on race and disability. In 2012 OEHR took over the City's Diversity Committee, via Resolution No. 36956 and changed the name to the Citywide Equity Committee. This committee has representatives from all organizations in the City and provides resources, and support to advance racial equity within organizations and the City as a whole. Both the OEHR and the committee have an *internal* focus that also extends to how deliver services to the community - the City of Portland needs to address our own systems and policies that are hindering racial equity.

One of the first tasks asked of the CEC was to develop guidance for City organizations to create their own racial equity plans.

The Racial Equity Roadmap is the result. The Racial Equity Roadmap is a comprehensive tool that will provide structure and direction for organizations to assess themselves and develop five year organization level racial equity plans.

The Racial Equity Roadmap was in development for over a year, and created by a dedicated team of City staff from across the City. They researched best practices from across the country as well as previous efforts within the City to develop an in-depth baseline assessment, guidance on plan development, and structure to support organization efforts.

We would like to offer special thanks to the 'All Hands Raised' project, the Racial Equity Strategy Guide developed by the Urban League in concert with City of Portland staff, and Crossroads Antiracism Organizing & Training for their analysis and their "Continuum on Becoming Antiracist Multicultural Institution".

RACIAL EQUITY ROADMAP

The Racial Equity Roadmap is an excel tool, that will be available for download from PHBs website, and designed for organizations to use in the development of their racial equity plan.

The Roadmap includes a baseline assessment, analysis of the assessment, evaluation of gaps within a organization in relation to racial equity, a tab to assist in developing the organization plan and tabs for yearly review of plan actions and results. The Roadmap is structured on the assumption that a organization's equity plan is a five-year plan. At the end of five years, organizations should re-do the assessment, evaluation and planning to see how they've progressed over time.

The Roadmap is *outcome driven* and organizations are expected to report not just on actions but on the outcomes of those actions. If an action is not producing the desired outcome, organizations should adjust their efforts. The Racial Equity Roadmap is a tool to help organizations *develop* a comprehensive and effective racial equity plan, it will help provide structure and consistency across the City.

By using a single tool across all organizations, the City of Portland and PHB - for the first time - will be able to compare racial equity work across all organizations in an 'apples to apples' comparison. Past efforts in the City have been led by individual organizations and vary so widely that it's impossible to see how organization efforts on racial equity relate to each other, or how the City is doing overall.

While all organizations will use the Roadmap to perform baseline assessments, develop racial equity plans, and report the results to PHB, the Roadmap is not intended to be punitive. No organization is expected to achieve a 'perfect score.' In fact, we aren't aware of any organization that could achieve the perfect score. The idea is to move towards the Roadmap's vision. We are undergoing a deep assessment of our work at the City of Portland and working to change a long standing system built to benefit a community that has

changed around us. The Roadmap is an opportunity to take a step back and ask difficult questions, knowing the we may not have the answers. This should be expected. PHB, the Office of Equity and Human Rights, the Citywide Equity Committee, and our network of national partners are all here to help troubleshoot, share resources and promising practices.

RACIAL EQUITY CONTINUUM

The Roadmap includes the Racial Equity Continuum, an aspirational matrix that maps the path we are travelling together. The Continuum is intended as a tool to help bureaus envision what we can accomplish as a fully inclusive and racially equitable institution. It includes examples of the obstacles and achievements found in each stage of the continuum. The Roadmap assessment will provide an average score that places the bureau on the continuum.

RACIAL EQUITY ROADMAP TOOL

You can find the Racial Equity Roadmap tool in the Office of Equity and Human Right's webpage here:

<https://www.portlandoregon.gov/PHB/roadmap>

It is an excel workbook with extensive formatting that was designed for Excel 2007 or later. It should also work in earlier versions of Excel, but with fewer features. Please do not adjust the tool's formatting. If you have technical questions about the tool, please contact PHB and they will arrange help for your organization.

PREPARING FOR THE ROADMAP

Successfully using the Roadmap to develop an organization racial equity plan will require preparation.

COORDINATION TEAM

Each organization should develop a coordination team, a small group who will shepherd the organization through the entire Roadmap process. This team needs five things in order to ensure the success of this work.

- *Authority* - either by having upper management Staff on the team or by authorization from Director to spend time on the project. The coordinating team will need to ask staff in different divisions/programs/departments to provide information, to spend time on Roadmap, and to take various equity actions. They need to have sufficient authority to make these requests. The coordination team should be in regular communication with the Director on the progress of the project.
- *Expertise* - data and technical expertise on Excel, finding and collating the data used to inform the Roadmap and project management.
- *Familiarity* - be familiar with the City's philosophy on racial equity and the language we are using. They also need familiarity with the structure of their organization to know who to talk to about various aspects of the Roadmap.

Time - the coordination team should be given dedicated time for this project. It's recommended that the organization's Title VI coordinator and the CEC rep are part of the coordination team.

The coordination team should attend PHB's orientation training and supplemental racial equity training.

The coordination team is responsible for meeting the various deadlines in the Roadmap process, for ensuring the reports are provided to PHB, and they are also the point of contact for any questions that may come from PHB regarding the organization's Roadmap work.

THE ORGANIZATION

The Roadmap and the organization racial equity plan will take organization resources to implement; in terms of time, money, skills, and effort. Each action item is expected to be assigned to individuals or team within the organization. Organizations are expected to be willing to change their policies, the way they do business, their habits, and cultures that exist within the organization. These expectations should be acknowledged and built into organization work plans and budgets.

It's suggested that all staff in the organization attend OEHR's basic racial equity training course, or equivalent training at minimum.

SUPPORT

The Portland Housing Bureau is the central point of contact for questions about the Roadmap and for assistance, training and support during the Roadmap process. Your contract manager will be a bridge to this resource.

Resources available include the Roadmap webpage, which includes background and training materials, schedules for training sessions, frequently asked questions and contact information for specific assistance.

Roadmap Orientation sessions will be scheduled regularly, to provide organizations with an initial introduction to the Racial Equity Roadmap. PHB will hold open office hours to help Organizations through the process. Annual reports will have a mechanism for flagging areas where Organizations need support. Extra assistance can be provide upon request.

TAB 1: ORGANIZATION PROFILE

The Racial Equity Roadmap begins with the organization profile. This first tab provides baseline information about your organization for reference when developing your organization Racial Equity Plan.

Section 1: Organization Roadmap Information

This section includes start and submittal date for the Organization Racial Equity Plan, the Director or Commissioner in Charge, the names of the Coordination Team, CEC Rep, Title VI coordinator and a list of the organization's primary divisions or programs. If a division or program is listed here, it must perform the baseline assessment as an independent entity. Large organizations may have several separate divisions or programs participating, small organizations may only have a couple.

Section 2: Organization Workforce Demographics

This is the demographic information about the organization. It breaks down the race of organization staff, based on information drawn from the Organizations employee data. This can be completed with assistance from your Human Resource department or by whichever assessment means you have available. **Depending on the inputs, the spreadsheet can help further analyzes the information by providing racial data for management staff, and represented staff, if any.**

Organizations will need to create an internal process to determine the percentage of people of color in management positions, represented employees, and those who speak a languages other than English.

Section 3: Organization Contracting Practices

The City of Portland participates in a Minority, Women Owned, Emerging Small Businesses program to increase contracting with people of color and other underutilized contractors. This section analyzes the organization's MWESB practices, and specifically identifies contractors of color. **The organization will need to contact its' Purchasing department to get this information.**

As data is entered into the spreadsheet, several graphs will be developed to provide a quick visual reference on the organization's current racial make-up and some of its practices.

Please provide the following information. Responses should be entered in the yellow fields. This file will work best with Excel 2007 or more recent versions. While all features may not be available in earlier versions, the primary functionality should remain in

Date Plan Submitted	7/10/2014
Plan Year for Start of Plan	8/1/2015
Plan Year for End of 5yr Plan	8/1/2019
Bureau Name	Bureau of Planning and Sustainability
Commissioner in Charge	Mayor Charles Hales
Director Name	Susan Anderson
Bureau Service Area Category	Community Development Services Area
Bureau CEC Rep ID	Erica Dwyer
Bureau CEC Rep ID	Darius Williams-Norris
Bureau Title VI Coordinator	Darius Williams-Norris
Bureau AA Coordinator	Darius Williams-Norris

List All Primary Programs, Departments or Divisions

Bureau/Unit	
Clean Plan	
Clean Energy	
Green Building	
Grow	
Central City	

Bureau Workforce Demographics Bureau demographics can be pulled from here: <http://www.portlandoregon.gov/ochr/355071.xml>

Race	Percent of employees
American Indian or Alaskan Natives	4%
Asian	5%
Black	9%
Hispanic or Latino	2%
Hispanic	9%
Hispanic or Pacific Islander	2%
Two or more races	2%
White	70%

The following demographics should be pulled from SAP an internal Bureau survey:

Total number of employees	110
Total number of represented employees	30
Number of employees of color who are represented	15
Number of languages spoken within the Bureau	3

The following demographics should be pulled from the most recent Affirmative Action Report:

Total Number of Management Level positions	10
Number of Management level positions held by people of color	2
List any areas of underutilization	

Bureau Contracting Practices Data available from Bureau of Purchasing.

Number of active contracts for professional services, construction projects, and goods and services	100
Number of MWESB Contracts	20
Breakdown of MWESB Contracts by:	
Minority-owned businesses	4
Women-owned businesses	6
DB (emerging small businesses)	10

Percent of Employees by Race

People of Color in Management

Represented vs Non-represented

MWESB Utilization

The Organization Profile page is used by PHB to help give them a snapshot of information about the organization, and is a useful collection of baseline information for the organization as well.

TAB 2: ASSESSMENT

The baseline assessment is a key part of the Racial Equity Roadmap. It consists of 41 questions divided into six components. These questions are intended to help organizations determine where they are *now* on a Continuum towards achieving racial equity. The assessment is used to evaluate where the organization is, provide analysis of gaps that need addressing, and provide an average that will place the organization on the Continuum. Organizations should ensure that enough time and resources are available to answer the assessment questions thoroughly.

Answers fall in a range of 0-5, and the definitions of the range are described on the tab. Please be aware that 0, or not applicable, should be rarely used in the assessment.

There are vertical columns available for different programs within the organization that are large enough to answer the assessment individually. Each header is populated from the Organization

Profile tab where programs are entered. Individual divisions or teams should answer the survey questions from their own perspective and experience. If your organization is very small, and will only be responding to the questions at the organization level, use the first input column and list Organization wide, instead of program names, on the Profile Tab.

Bureau of Planning and Sustainability		Equity Baseline Assessment FY 14-15		
Responses Include:		<i>Directions:</i> In the blank cells below each program or department select best describes where your organization is in relation to the 41 equity practices listed at the top left. Cells will become colored once a number for recommendations about next steps.		
0	This is not relevant or does not exist in our Bureau of department Haven't started work in this area yet or this may happen on an 'as-needed' basis			
1	Plans exist to do this but have not yet been implemented. It may happen but inconsistently and with limited success	Bureauwide	Division/Program 1	Division/Program 2
2	This is in place, or occurs regularly. We have evidence of its use and are assessing its effectiveness.			
3	This is in place with clear evidence of success. Structural change has been made in order to be effective in this area			
4	This is part of our routine, and identity. We model it for others. Practice has resulted in effective sustainable changes			
5				
5				
A. Organizational Commitment				
1	Public written commitment to address/eliminate racial and ethnic inequities exists in guiding documentation: mission, vision, goals.	4		
2	Operational commitment to address/eliminate racial and ethnic inequities is visible in the organization. (i.e. physical characteristics of offices and location, Standard Operating Procedures)	3		
3	Development and monitoring of racial equity plan, or strategy integrates perspectives from staff and constituencies of color.	5		
4	Representatives from communities of color are participants in strategy development for any program, policy, or service that impacts them.	3		
5	There is ongoing evaluation of policy, service, or program impacts and progress towards racial equity.	4		
6	Staff have a shared language on race, racism, and social justice and are culturally responsive and inclusive in communication	5		

Section 1: Organizational Commitment

This section reflects the organization's commitment to racial equity at the policy, planning and budget level. It also includes questions about the general office environment for staff regarding discussions about race and racial equity. The organization's EEO and AA practices can help inform this section.

Section 2: Leadership and Management

This section explores the way leadership and management level practices affect the organization's ability to advance racial equity. Several of the questions are about how leadership supports racial equity in the organization,

and among their employees. There is an important question about networking at the leadership level - to help support management and leadership staff in the hard work of racial equity.

It's important, when getting feedback from line staff, to build in some way to protect staff from retaliation or fear of retaliation when they provide honest, if negative, feedback. If you have questions about how to best do this, we strongly encourage you to contact PHB for assistance.

Section 3: Workforce

These questions address how racial equity goals and practices are imbedded in workforce development and hiring. The organization's AA coordinator can be very helpful in responding to this section.

Section 4: Community Access and Partnership

This section looks at how the organization engaged with external partners and the City of Portland community in regards to racial equity. Even organizations that are internal service organizations will still have the ability to respond to this section - as they all operate in service to the public, if only indirectly. For example, other organizations can be considered partners and, technically, all City organizations are open to questions and input from residents of the City. Even if your organization is internally focused, please review this section carefully to consider how the questions would apply. .

If you have an Organization Advisory Committee, they can provide valuable feedback for this section.

Section 5: Contracting (skip this section if it does not apply to your organization)

This section asks about the organization's contracting practices. The Organization should have a contract manager that can help with this section. The organization may also work directly with Purchasing to obtain the required information to breakdown their MWESB contracting numbers on the Organization Profile Tab.

Section 6: Data, Metrics and Continuous Quality Improvement

This important section reviews how organizations collect information and track the results of their actions to improve racial equity. Organization practices in this area will help a great deal later in the process, when the organization develops their racial equity plan and have to identify methods for tracking progress.

It's likely that data collection is dispersed among different programs within the organization, the Roadmap tool is one way to help organizations centralize racial equity metrics.

TAB 3: ANALYSIS

The analysis tab draws on the answers provided for the baseline assessment (Tab 3). The same questions are listed on the left, divisions or programs are listed along the top. Any answer in the baseline assessment of less than 3 will result in a red ‘action needed’ result. These are issues that the organization should focus on when developing their organization racial equity plan.

There are two narrative questions on the analysis tab:

1. What opportunities for change does this analysis suggest? (Informs action items)

2. How will you measure progress (data, behaviors, etc.)? (Informs performance indicators)

They are intended to help the organization think about how to resolve the issues brought up by the analysis.

Though the ‘action needed’ indicator is a good guide for organizations in developing their own racial equity plan, organizations are not *required* to focus only on those areas. Organizations are encouraged to include actions that help focus their specific needs and practices that make use of their strengths, and reflect the organization’s interests and functions.

The analysis tab is intended to be a valuable resource for informing the development of the organization’s racial equity plan.

Areas to consider that clearly need improvement:						Directions: Complete the following reflections for each of the 41 we've given a score of less than 3 and should be	
	Bar overall	Division/Program	Division/Program	0	0	0	
Organizational Commitment							1. What opportunities for change does this analysis suggest? (Informs action items)
Public written commitment to address/eliminate racial and ethnic inequities exists in guiding documentation: mission, vision, goals.		Action needed	Action needed	Action needed	Action needed	Action needed	
Operational commitment to address/eliminate racial and ethnic inequities is visible in the organization. (i.e. physical characteristics of offices and location, Standard Operating Procedures)		Action needed	Action needed	Action needed	Action needed	Action needed	
Development and monitoring of racial equity plan, or strategy integrates perspectives from staff and constituencies of color.		Action needed	Action needed	Action needed	Action needed	Action needed	
Representatives from communities of color are participants in strategy development for any program, policy, or service that impacts them.		Action needed	Action needed	Action needed	Action needed	Action needed	
There is ongoing evaluation of policy, service, or program impacts and progress towards racial equity.		Action needed	Action needed	Action needed	Action needed	Action needed	
Staff have a shared language on race, racism, and social justice and are culturally responsive and inclusive in communication		Action needed	Action needed	Action needed	Action needed	Action needed	
Difficult conversations about race are encouraged and supported in safe, confidential and/or private spaces.		Action needed	Action needed	Action needed	Action needed	Action needed	
Racial equity innovation and problem solving is rewarded and recognized.	Action needed	Action needed	Action needed	Action needed	Action needed	Action needed	
Funds are allocated to support programs/policies vital to or disproportionately needed by particular disadvantaged racial/ethnic communities		Action needed	Action needed	Action needed	Action needed	Action needed	
Leadership and Management							
Management understands power and privilege and consistently applies a racial equity lens.		Action needed	Action needed	Action needed	Action needed	Action needed	

TAB 4: EVALUATION

The evaluation tab takes the data from the baseline assessment, creates an organization average for each question, an organization total average score to indicate where on the Racial Equity Continuum the organization is currently. The evaluation tab is like the Roadmap's GPS system, it gives the organization a quick snapshot of where they are and, with the assistance of the continuum and the analysis tab, where they should be headed.

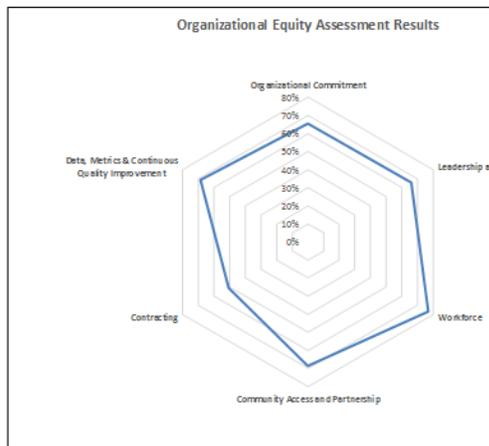
Overall Score on Continuum	3
Phase: Identity Change	

Policies and practices begin to shift focus, specifically call out racism, and seek to eliminate racial bias. There is broad ownership across the Bureau for initiatives that address institutional racism. There is intentional review of existing policies and practices to understand barriers towards achieving racial equity goals.

A.	Organizational Commitment	Average Program Level Score
1	Public written commitment to address/eliminate racial and ethnic inequities exists in guiding documentation: mission, vision, goals.	3.8
2	Operational commitment to address/eliminate racial and ethnic inequities is visible in the organization. (i.e. physical characteristics of offices and location, Standard Operating Procedures)	3.6
3	Development and monitoring of racial equity plan, or strategy integrates perspectives from staff and constituencies of color.	2.6
4	Representatives from communities of color are participants in strategy development for any program, policy, or service that impacts them.	3.2
5	There is ongoing evaluation of policy, service, or program impacts and progress towards racial equity.	2.2
6	Staff have a shared language on race, racism, and social justice and are culturally responsive and inclusive in communication.	3.8
7	Difficult conversations about race are encouraged and supported in safe, confidential and/or private spaces.	3.8

0	Exclusive
1	Passive
2	Symbolic
3	Identity Change
4	Structural Change
5	Full Inclusion

A.	Organizational Commitment
B.	Leadership and Management
C.	Workforce
D.	Community Access and Partnership
E.	Contracting
F.	Data, Metrics & Continuous Quality Improvement



TAB 5: THE PLAN

The Plan tab is where the organization develops their organization racial equity plan. Drawing on the Roadmap assessment and evaluation of the organization's current practices regarding racial equity, the organization will create objectives, actions, timelines, and progress indicators.

Progress indicators are particularly important, because the racial equity plan should be *outcome* oriented. Organizations need to determine benchmarks for success and, if those benchmarks are not achieved, analyze why and adjust their actions.

As part of the plan, the people who are responsible for achieving the various objectives must have time, authority and resources to do their job. One person should not be responsible for all actions in an organization's racial equity plan. The work should be divided up across the organization.

The organization's racial equity plan is an ambitious document, and organizations are encouraged to partner with each other, and outside groups and agencies to help them achieve their goals. The Office of Equity and Human Rights is available to provide support, your own organization's Organizational Equity Committee members can provide expertise and the organization's Diversity or Equity Committee can also be another valuable resource.

This tab is designed to provide a skeleton to support the organization's racial equity goals, and is also the tab that PHB and the Organizational Equity Committee uses to evaluate the objectives and actions the organization is taking to achieve greater racial equity.

FY 14-15
Bureau of Planning and Sustainability
Racial Equity 5 Year Plan

	Category	Objectives	Actions	Person or Position Responsible	Timeline
	Select the assessment category the action will address.	What is intended to change within the Bureau?	What activity will be accomplished within the planning period to achieve this Objective?	Who is responsible for completing and reporting on the action for the annual status report?	When will the action be completed?
EX.	Organizational Commitment	Decisions are made more equitably	Convene an equity working group that has representatives from throughout the Bureau to work on racial equity policies. The group will have representatives of people of color, labor, management, and members of the all of the Bureau's different committees.	Director's Assistant	Fall 2014
1					
2					
3					
4					
5					
6					
7					
8					
9					

TAB 6+: ANNUAL PROGRESS REPORTING

Organizations are expected to report annually on their progress implementing their racial equity plan. The Roadmap includes tabs to make reporting consistent and easy. These tabs are very similar to the Plan tab; with actions and progress indicators. However there are two important columns at the right:

Challenges	Successes
<i>Document challenges that the action has faced and plans for addressing challenges or how the outcome or action might be refined in future reporting periods.</i>	<i>Document successes that have been achieved.</i>

These two columns are important for the Roadmap work, PHB will be reviewing these columns. By tracking challenges, PHB will be able to see what obstacles are affecting progress towards racial equity Citywide and attempt to resolve those issues. Organization successes can be shared with others who are looking for best practices or assistance with their own racial equity goals. Please use as much space as needed to describe challenges and success as the organization works on their racial equity plan.

Some things to consider when doing the yearly updates:

- Did all activities fit within the plan objectives?
- Are there goal areas, objectives, or strategies that are receiving less attention than others?
- What do the results indicate as to how to improve?
- Is there a need to change the plan?

THE ORGANIZATION'S EQUITY PLAN IS COMPLETE AFTER FIVE YEARS. AT THE END OF THAT TIME, THE ORGANIZATION SHOULD RE-EVALUATE THEMSELVES USING THE ASSESEMENT AND DEVELOP THEIR NEXT FIVE YEAR PLAN.

RESPONSIBILITIES AND REPORTING

The Roadmap tool is intended to assist organizations in the development of their racial equity plan, and help them track their progress. It is also intended to provide substantive information on the organization's work to others.

There are several points where organizations are expected to report on their progress through the tool. Organizations are responsible for completing the reports, and ensuring the Director has time to review and sign off on the report prior to submittal to PHB.

PHB and the organizations' equity committee review the reports and provide feedback to the organizations. PHB will also compile the successes and challenges from all organizations to be provided in summary reports to the Portland Housing Advisory Commission on an annual basis.

REPORT 1: BASELINE ASSESMENT

Complete Tab 1 and 3: The organization profile and the baseline assessment.

- Information is reviewed and signed off by the Organization Director
- Information is sent to PHB via: (contract manager and assessment coordinator, Kim.mccarty@portlandoregon.gov)
- PHB and a workgroup from PHAC will review the assessments and provide feedback as needed.

What will PHB be looking for?

- Is the assessment complete?
- Has the Director signed off on the information?
- Is there a diverse (management and staff, represented and not, people of color and white people) coordination team working on the Roadmap?
- Where, generally, does the organization fall on the Racial Equity Continuum?
- What are the challenges and opportunities to improve equity and where can PHB be a partner in that effort?
- Are there numerous 'not applicable' entries?

PHB may reach out the organization point of contact with questions or concerns regarding the assessment phase.

REPORT 2: THE PLAN

Complete the 5th tab of the Roadmap Tool.

- Once the organization has completed their plan tab, and it has been signed off by the Director, they should submit the entire Roadmap to PHB: (Kim.mccarty@portlandoregon.gov)

- PHB and a workgroup from the Organizational Equity Committee will review the plan and follow up as needed.

What will PHB be looking for?

- Are all phases complete?
- Has the Director signed off on the information?
- Is there a diverse (management and staff, represented and not, people of color and white people) coordination team working on the Roadmap?
- Do plan objectives relate to ‘action needed’ entries on the analysis tab?
- Are there measurable benchmarks for the plan objectives?
- Do objectives seem to be dispersed among a variety of staff members?

REPORTS: 3- 8: ANNUAL PROGRESS REPORTS

Organizations are expected to report annually to PHB, using the progress report tabs in the Roadmap Tool.

- Information is reviewed and signed off by the Organization Director
- Information is sent to PHB via: (kim.mccarty@portlandoregon.gov)
- PHB and a workgroup from the PHB will review the organization’s yearly updates and provide feedback and, if needed, suggestions for resources.

What will PHB be looking for?

- Have plan objectives been implemented or in progress?
- If there are have been challenges implementing specific actions, does the organization have an action plan for resolving the issue, or explanation why they cannot progress?
- Are there diverse staff working on the plan over the year(s)?
- Are benchmarks being recorded and updated as objectives change or are completed?
- Is the organization reporting on challenges and successes?

PHB AND ORGANIZATION REPORTS

PHB is tasked with tracking and reporting to PHAC on the progress of the City’s racial equity plans. They will compile the reports received from organizations and present a summary to PHAC on an annual basis.

PHB may also provide a summary report to City Council which includes the status on organization’s plan implementation’s analysis and recommendations as needed.

Should either the organization or PHB request it, PHB will arrange for a debrief meeting with the coordination team to go over any reports, feedback or suggestions.

QUICK START GUIDE

- *Director or designee should assemble the coordination team*
 - *Provide point-of-contact person to PHB*
- *Coordination team should attend a PHB Roadmap Orientation*
 - *Attend an PHB Equity Training as soon as reasonable*
- *Access the Racial Equity Roadmap webpage and download the Roadmap tool and manual*
 - *Review manual and tool*
- *Begin Roadmap process*
- *Complete the evaluation form and return completed Roadmap and evaluation form to PHB*
- *Schedule a debrief meeting with PHB designees*

FREQUENTLY ASKED QUESTIONS

Where can I find the Roadmap Tool?

The Racial Equity Roadmap Tool is on PHB's website here:

<https://www.portlandoregon.gov/PHB/roadmap>

Who can I talk to about technical problems with the Roadmap Tool (Excel)?

Your managers can help with technical questions about the Roadmap Tool.

Who do I talk to at PHB about the Racial Equity Roadmap?

You can contact PHB through your contract manager.

What is a 'coordination team'?

Each organization should assemble a coordination team; a small group of core staff who will shepherd the organization through the entire Roadmap process. Other staff may be asked to provide assistance for specific tasks.

What is the 'point of contact' person?

The point of contact person is the individual who acts as the lead for communications between the organization and PHB. They would be the person submitting the reports, responding to questions from PHB and ensuring that their coordination team, and their organization (if needed) is kept informed of Roadmap issues.

What is a 'component'?

A component is a single section on the baseline assessment. There are six components: Organizational Commitment, Leadership and Management, Workforce, Community Access and Partnership, Contracting, and Data, Metrics and Continuous Quality Improvement.

What is a phase?

A phase is a specific step on the Racial Equity Roadmap. Each tab defines a phase.

How long does the organization have to complete the Racial Equity Roadmap Tool?

Phase 1 must be completed by March 30th, 2015 and Phase 2 must be completed by June 30th, 2015.

What should the organization have when they have completed the Racial Equity Roadmap Tool?

When the organization has completed the Racial Equity Roadmap (not including the yearly updates), they should have a baseline assessment of the current

status of their racial equity efforts, an analysis of their assessment, and a solid outline of their racial equity plan.

Who is going to see the baseline assessment or other information in the Roadmap?

The Portland Housing Advisory Commission, as well as members of your Organizational Equity Committee will be reviewing organization reports. Directors should have reviewed the reports prior to sending them to PHB, Commissioners-in-charge will also be receiving the reports, plus the analysis by PHB and a summary report will be provided to PHAC, by PHB, on a yearly basis. These reports may be subject to the City's Public Records regulations.