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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការប្រឹក្សាស្តីពីការរើសអើងសូមទូរស័ព្ទទៅលេខ 503-797-1700 ។ www.oregonmetro.gov/civilrights ។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេបកប្រែសម្រាប់លោកអ្នក ។

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Materials following this page were distributed at the meeting.



Metro

Targeted Universalism Learning and Alignment Project

Retreat 5, Day Two: All Stakeholders

Thursday, April 2, 8:30 AM – 3:30 PM

Oregon Zoo, Cascade Crest Ballroom

Retreat Purpose and Assumptions

The Targeted Universalism Learning and Alignment project is intended to align four stakeholder groups on a recommendation for Metro’s future approach to racial equity through a set of 5 retreats. The outcomes of the fifth and final retreat are intended to shape the future of racial equity at Metro, with this process serving as a precursor to the refresh of the Strategic Plan to Advance Racial Equity, Diversity and Inclusion (SPAREDI) to come.

In order to achieve as much stakeholder alignment as possible, the second and final day of the fifth and final retreat brings together all four stakeholder groups— the Committee On Racial Equity (CORE), Racial Equity Leadership Table (RELT) and Senior Leadership Team (SLT), and Council—to build collective alignment on a recommended approach to racial equity that the Metro COO will utilize to shape implementation strategies and policy recommendations for Metro Council to consider. In addition, participants will test the proposed approach through practical application to Metro-specific issues and collectively envision the future of racial equity at Metro to inform the upcoming SPAREDI refresh.

A few things to note:

- **Critical Participation:** This project will shape how Metro advances racial equity going forward; your present, focused, and thoughtful participation is essential to meeting the retreat's objectives.
- **Co-Creation:** Shared leadership and co-creation are central to this project. Please be prepared for collaborative dialogue, iterative discussion, and "on-the-fly" alignment building.
- **Alignment:** Participants will be asked to indicate their level of agreement on recommendations using a gradient of agreement scale (fist to 5) which may require discussing areas of divergence, collectively considering nuanced topics, and compromising to reach an acceptable level of alignment. Participants are encouraged to practice deep listening and intentional sharing to support bridging and the building of common ground.
- **Public Meeting:** Please note that this retreat is a public meeting and will be livestreamed and recorded.

Retreat Day Two Objectives

1. Align on Metro’s future approach to racial equity to inform the refreshed SPARED.I.
2. Engage in relationship and trust building

Retreat Participants

All members of Metro’s Senior Leadership Team (SLT), Racial Equity Leadership Team (RELT), Committee on Racial Equity (CORE) and Metro Council are invited to participate in this retreat along with Metro’s consultants from Seed Collaborative who will be facilitating the retreat.

- SLT along with Metro’s Chief Operating Officer (COO) are responsible for operationalizing Metro’s policies and delivering services to the community. This group includes the deputy Chief Operating Officers; General Manager of Visitor Venues; the Metro Attorney; and senior leadership from all departments.
- RELT consists of staff of all levels leading racial equity work across the agency. This group includes formal equity leaders embedded in departments, department representatives identified by directors, Employee Resource Group co-chairs and DEI department staff.
- CORE consists of community leaders who advise Metro Council on the implementation of racial equity strategies across the agency.
- Metro Council consists of elected leaders that represent constituents in the Greater Portland region and provides policy direction for the public services, regional systems and long-term plans that Metro provides.

Day Two Agenda

Time	Activity
8:30 – 9:00 AM	Arrival, Settle In, Breakfast
9:00 – 9:45 AM	Opening and Context Setting <ul style="list-style-type: none">• Meeting called to order• Opening comments shared• Review of agenda and meeting norms including use of virtual comment and voting tool
9:45 – 10:05 AM	Warm Up Activity
10:05 – 11:15 AM	Activity: Problem Solving through TU <ul style="list-style-type: none">• This activity is intended to ground the conversation about the proposed approach to racial equity by providing a concrete example and giving all an opportunity to practice applying Targeted Universalism• Small group co-creative discussions, larger group share and discussion

Time	Activity
11:15-11:30 AM	Break
11:30 AM – 12:45 PM	Consider Proposed Racial Equity Approach <ul style="list-style-type: none"> • RELT and SLT’s proposed approach to racial equity will be shared with an opportunity for question and answer discussion • Pair check in and reflection, larger group discussion and alignment
12:45 – 1:45 PM	Lunch and Energizer Break
1:45– 3:00 PM	Setting Up Our Approach to Racial Equity for Success <ul style="list-style-type: none"> • This is an opportunity for all stakeholder group to vision together about the future of racial equity at Metro and how to set up the application of TU for success • Rotating small group ideation, larger group share out
3:00 – 3:30 PM	Next Steps and Close



**Project Advisory Team
Meeting Two:
*Assessment Analysis***



October 1, 2025

Agenda

1. Updates and Reminders
2. Presentation of Assessment Analysis
3. Reflection and Discussion
4. Next Steps



Retreat Dates

- **Racial Equity Leadership Table: November 10th and 12th**
- **Committee on Racial Equity: November 14th and 15th**
- Metro Council: December 9th and 11th
- Senior Leadership Team December 10th and 12th
- Combined Retreat: Week of January 19th TBD

Project Advisory Team Meetings

Meeting One (Sept 8th) - Orientation

Meeting Two (October 1st)- Assessment Analysis

Meeting Three (October 15th) – Feedback on Retreat Arc

Meeting Four (November 3rd) – Feedback on agendas for Retreats #1 & #2

Meeting Five (November 18th) – Debrief #1 & #2, feedback on Retreat #3 & #4 agendas

Meeting Six (December 15th) – Debrief Retreats #3 & #4, feedback on Retreat #5 agenda

Meeting Seven (January 6th) – Finalize Retreat #5 agenda

Meeting Eight (March TBD) – Debrief Retreat #5 and process as a whole

Norms Agreed at 9/8 PAT Meeting

- 1) Center the purpose and goal of this process
- 2) Listen deeply, show up fully, make space, share space
- 3) Trust the process, each other, the facilitators, and yourself
- 4) Keep personal information confidential, share project specific info only (supporting safe space)
- 5) Commit to common solutions
- 6) Value the experience and intuition of others
- 7) Check your authority but not your line of sight
- 8) Be vulnerable, honest, brave, curious, and willing to sit with discomfort
- 9) Be open to changing your mind in view of new information, bridge across diverse opinions and viewpoints
- 10) Be timely and responsive to each other and to consultants
- 11) Utilize file sharing to access and share materials

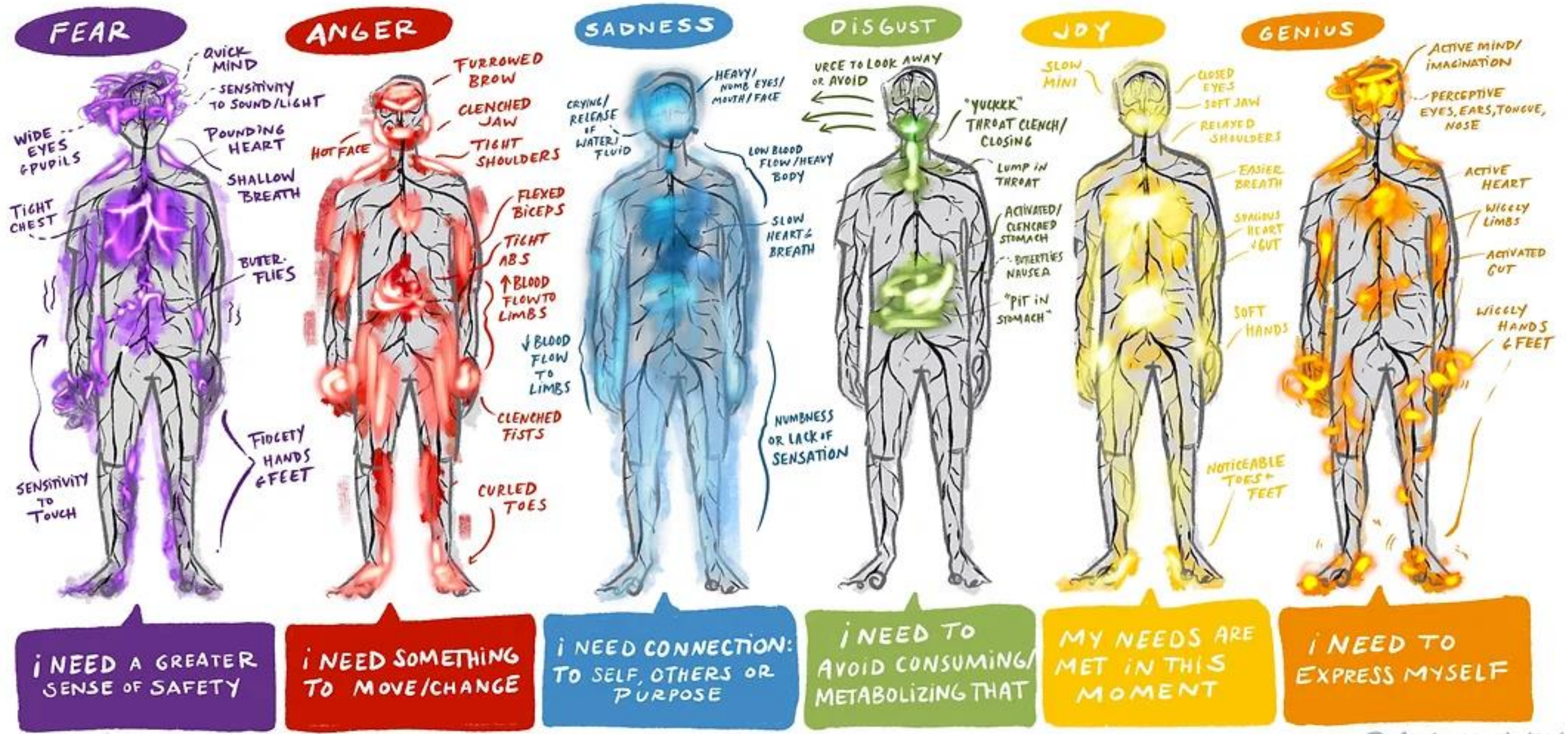
Assessment Presentation

1. Introduction & Methodology
2. Summary Analysis
3. Metro's Approach to Racial Equity
4. Strengths and Achievements
5. Barriers, Challenges, & Areas of Improvement
6. Future Vision for Racial Equity
7. Q&A and Discussion

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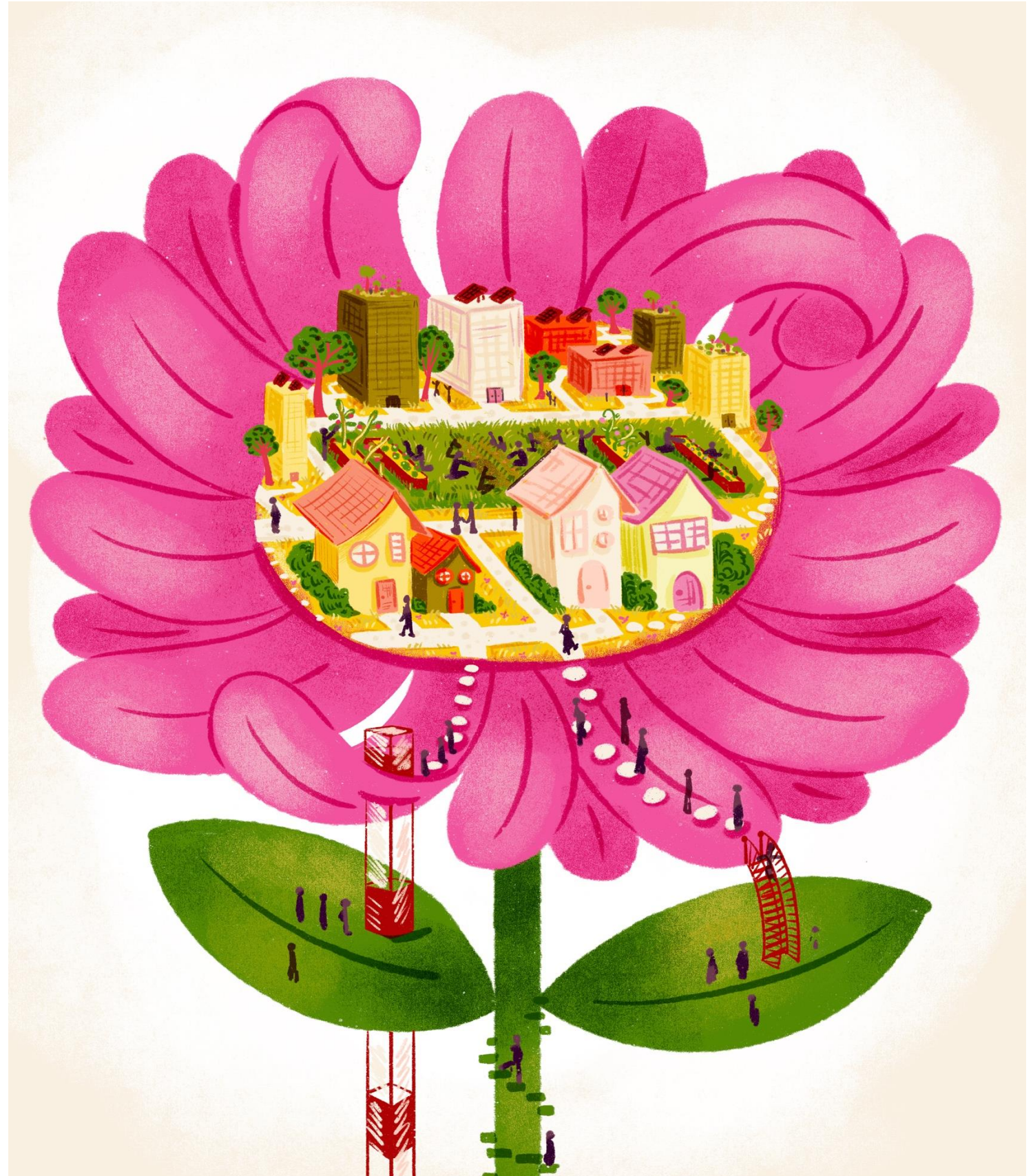


Grounding through Self Check-In



@AVANMUIJEN

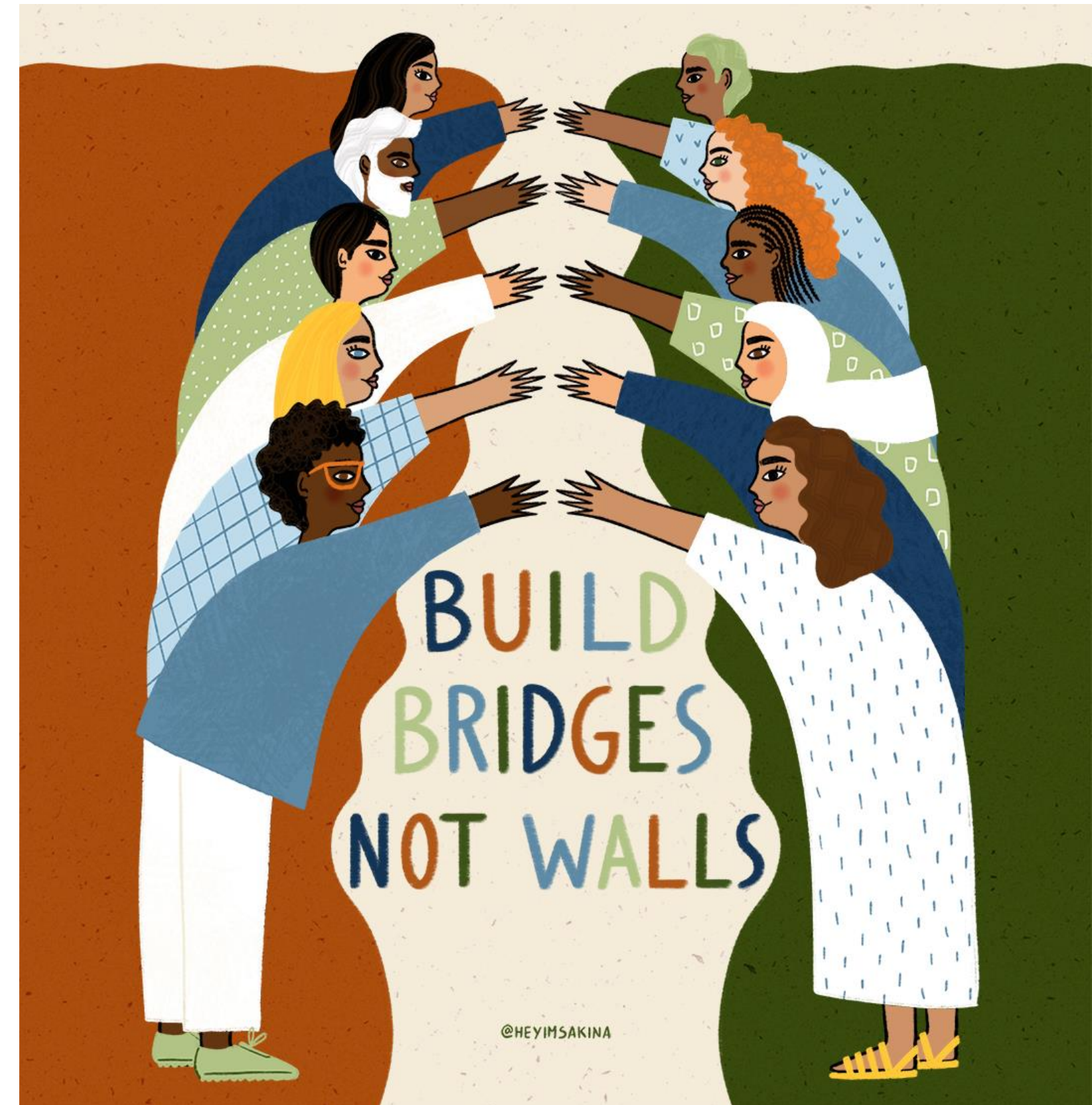
Introduction & Methodology



Art Credit: [Teo Georgiev](#) for [Fine Acts](#) x [OBI](#)

Reminder: Project Overview

- **Project purpose**
 - Clarify and align Metro's approach to racial equity in support of the new/refreshed DEI strategy.
 - Develop a common understanding of Targeted Universalism (TU), its application and how it aligns with racial equity.
- **Project scope**
 - Four stakeholder specific retreats (one for each stakeholder group).
 - One joint stakeholder retreat to align the racial equity approach at Metro and decide whether this approach includes TU.
- **Targeted Universalism (TU):** TU is a process of co-creating and pursuing shared universal goals through targeted interventions developed for specific communities, with the objective of system and culture change, to raise all groups to a common aspiration.



Reminder: Four Stakeholder Groups

- Committee on Racial Equity (CORE)
- Metro Council (Council)
- Racial Equity Leaders Table (RELT)
- Senior Leadership Team (SLT)

Racial Equity Assessment Purpose and Context

- Seed sought to understand Metro's:
 - Definitions, **approaches**, and progress towards racial equity
 - Successes and challenges
 - **Targeted Universalism familiarity**, perceptions, and acumen
 - **Vision for the future** of racial equity
- Assessment informs the focus and topics of upcoming retreats

Research Questions that Guided Assessment

- 1) What is **Metro's definition of racial equity**? How is this similar and different from the definitions held by individuals and by stakeholder groups? Which populations are included in these various definitions of racial equity?
- 2) What visions do individuals and groups hold for the **future of racial equity** work at Metro?
- 3) What is the understanding and **acumen of Targeted Universalism** (TU) among individuals and stakeholder groups at Metro?
- 4) How were/are racial equity and TU historically and currently **operationalized** at Metro? What are the successes and challenges to date?
- 5) How is Metro responding and adapting to executive orders, relevant lawsuits, and pressure from the **federal government**?
- 6) What **conditions are required** to ensure successful alignment between stakeholder groups on racial equity and TU at Metro?

Methodology and Limitations

- **20 Documents**, including DEI department documents, SPAREDI, employee engagement surveys, and 2024 the Impact Report.
- **8 Interviews** with members of all four stakeholder groups – CORE, Council, RELT, SLT.
- **3 Focus Groups** with members from RELT, SLT, Council (CORE members' availability was limited).
- **Data Analysis** - Two rounds of coding on all transcripts to generate themes and insights which were then integrated with document review and layered with higher order analysis.
- **Limitations** - No focus group with CORE, crunched timeline, and small sample size (Seed spoke to 41 people out of ~1,600 Metro staff).

Context

- To preserve confidentiality, **only themes stated by two or more** participants have been included, no names or quotes, stakeholder groups are named.
- Interview and Focus Group Participants will be referred to as **“Participants”**.
- Not every Participant answered every question.
- Analysis is organized into the following **four sections**:
 - Summary Analysis
 - Strengths and Achievements
 - Barriers, Challenges, and Areas of Improvement
 - Future Vision



Summary Analysis



Summary: Racial Equity Assessment

- **Metro's years of investment in racial equity have generated goodwill and a variety of achievements.**
 - Stakeholders from all four groups are committed to the continued advancement of racial equity.
 - Achievements include historic investment in housing, workforce and vendor diversity, and community partnerships.
- **Despite accomplishments, progression of racial equity at Metro may be hindered by:**
 - Aspects of the organizational culture including "stuckness", perfectionism, poor communication flows, and fatigue.
 - "Blurry Leadership" including lack of clear roles, authority, accountability, and support.
 - Limited clarity, alignment, and narrow focus of racial equity work.

Summary: Racial Equity Assessment

- **Participants uplifted 6 ideas for the future of racial equity at Metro:**
 - Shift from process to outcomes oriented
 - Build collective ownership
 - Clarify scopes and roles
 - Exercise shared leadership
 - Create and update tools
 - Consider adopting Targeted Universalism



Summary of Metro's Approach to Racial Equity

- SPAREDI defines racial equity as ***“Race can no longer be used to predict life outcomes and outcomes for all groups are improved.”***
- Participants from **3 of 4 stakeholder groups were aligned** with this definition (Council, RELT, and SLT).
- SPAREDI outlines **5 goals and 6 intended approaches** to achieving racial equity.

5 Goals (Summary):

- A. Convening regional partners
- B. Meaningfully engaging communities of color
- C. Promoting a racially diverse workforce
- D. Creating safe and welcoming services, programs, and destinations
- E. Equitable allocation Metro resources

6 Approaches:

1. Leading with race
- 2. Targeted Universalism: Addressing the disparities that affect the most disadvantaged will generate solutions to address most of the needs of other vulnerable groups.**
3. Building infrastructure
4. Generating support
5. Partnering with communities of color
6. Measuring progress

Summary of Achievements and Strengths

Achievements

- ❖ **Historic investments:** Investments in parks and affordable and supportive housing funded by bond and serve measures
- ❖ **Partnerships:** Strengthened partnerships with community organizations; attempts to be more responsive to community members
- ❖ **Diversity:** Increased workforce and vendor diversity
- ❖ **Employee Retention:** equity work and ERGS positively impacting staff retention

Strengths

- ❖ **Service and Innovation:** Staff are passionate about their work, public service and technical expertise, and Metro's culture offers opportunities to explore creative and innovative racial equity work
- ❖ **DEI Investments:** Metro has resourced a standalone DEI department with policies, staff, budget, and programming
- ❖ **DEI Team:** Has been influential in generating momentum through communications, narrative building, and broad buy-in conversations on racial equity
- ❖ **DEI Buy-In:** Council and SLT members are all supportive of equity work at Metro

Summary of Barriers and Challenges

Organizational Culture

- ❖ Stuck in Process
- ❖ Perfectionism and Performativity
- ❖ Communication and Transparency
- ❖ Fatigue

Leadership, Roles, and Accountability

- ❖ Leadership and Support
- ❖ Roles and Authority

Process and Outcomes Areas for Improvement

- ❖ Narrow Focus
- ❖ Clarity and Alignment
- ❖ Current Political Context

Barriers and Challenges: Organizational Culture

Stuck in Process:

- ❖ Participants from SLT, RELT, and Council described Metro's culture in general and the operationalization of racial equity in particular as being process oriented and that there can be a lack of implementation and accountability.
 - ❖ Process orientedness is exacerbated by Pacific Northwest "niceness" and passive aggressiveness, Metro's struggles with adaptability and moving from planning to doing and making tough decisions.
 - ❖ Participants described Metro as conflict averse and avoidant, bureaucratic, with an assumed need for consensus, and risk aversion of middle management.
 - ❖ The result is "stuckness", which can disrupt momentum, cause disillusionment, and stall progress.
-
- ❖ **Perfectionism and Performativity:**
 - ❖ SLT and RELT Participants reported a prevalence of perfectionism and fear of failure in Metro's culture, driving overperformance and burnout.
 - ❖ Culture of fear, a "word cop" culture, DEI knowledge weaponization, and the fear of being "canceled."
 - ❖ Makes critique and learning difficult, acts as a barrier to reflection on racial equity, concern that discussing areas of improvement could be taken as anti-racial equity.

Barriers and Challenges: Organizational Culture

❖ **Communication and Transparency:**

- ❖ Participants from SLT, Council and RELT lamented poor communication flows, including internal data hoarding, siloing, and data being withheld or curated to fit a narrative.
- ❖ “More communication” was suggested to increase employee engagement shared in 2023 Employee Survey.

❖ **Fatigue:**

- ❖ RELT and SLT Participants expressed feeling “framework fatigue”.
- ❖ Frustration that racial equity plans and tools are incomplete, ineffective, inconsistent, or not being utilized.
- ❖ Contributes to the feeling of burnout.

Barriers and Challenges: Leadership, Roles, and Accountability

❖ **Leadership and Support:**

- ❖ Some RELT Participants reported not feeling support from leadership for racial equity work and that RELT staff feel disempowered from doing their assigned jobs.
- ❖ Some Participants from SLT and RELT expressed frustration that power is tied to people, not roles.
- ❖ These dynamics can create an unclear “tone-at-the-top”, stoking uncertainty or ambivalence.
- ❖ Combined, these dynamics lead to “blurry leadership” and can slow momentum and limit the range, depth, and impact of DEI initiatives.

❖ **Roles and Authority:**

- ❖ Participants shared that Metro’s Chief Operating Officer and Council “owns” racial equity.
- ❖ Participants believe Council and SLT have a role to play in sending a clear message on prioritizing racial equity outcomes.
- ❖ Lack of role clarity between Council and staff, including Council exerting more influence on projects.

Barriers and Challenges: Leadership, Roles, and Accountability

❖ Roles and Authority (continued):

- ❖ Council - Some Participants shared that sometimes staff treats Council like a checklist, that Council doesn't get the support it needs from staff, and that Council sometimes doesn't have the opportunity for debate or to be included as thought partners due to process timelines.
- ❖ DEI Department - Some Participants reported a lack of clarity on the DEI Department's role and authority and that the DEI Department plays a variety of roles, but they don't have the authority to enforce accountability.
- ❖ CORE - Some Participants noted that CORE mostly reacts to staff requests, that staff can sometimes treat CORE like a checklist, and that sometimes CORE struggles to get the support it needs from staff to translate wonky technical information into layman terms.
- ❖ These challenges with leadership, roles, and accountability can limit impact and erode trust which is vital to easeful advancement of racial equity.
- ❖ Shared leadership is supported when teams are empowered with clear mandates.
- ❖ Clear and supportive "tone-at-the-top" is critical clarifying racial equity as a priority and generating impact.

Barriers and Challenges: Process and Outcomes Areas for Improvement

❖ **Narrow Focus:**

- ❖ SLT, Council and RELT reported that some DEI programming at Metro is too narrow.
- ❖ Some Participants expressed a tension between the public agency nature of Metro and a “nonprofit culture,” where staff can see themselves as divorced from politics and broad public responsibility.
- ❖ Some SLT Participants called for right sizing the work to the systems and resources available.
- ❖ Some RELT Participants highlighted a need to develop and strengthen tools to be responsive to intersectionality.

❖ **Clarity and Alignment:**

- ❖ Some CORE and SLT Participants described a lack of common baseline across the agency, each department has its own goals and plans that can sometimes contradict each other.
- ❖ SLT and RELT Participants stated the need for an agency-wide framework to improve consistency and effective implementation across different departments.
- ❖ 2023 Employee Survey lists “Show Us: Stronger Measurements, Clarify Goals, Share Successes” as the number one action Metro needs to take to better address DEI moving forward.

Barriers and Challenges: Process and Outcomes Areas for Improvement

❖ **Current Political Context Exacerbates Areas of Improvement:**

- ❖ “Keep in mind outside influences” was noted by 26% of employees in the 2023 Survey as the greatest challenge to achieving goals related to DEI.
- ❖ SLT and Council Participants noted having to navigate a tricky balance between compliance versus risk given Metro receives federal funding, which could be impacted by Trump Administration actions.
- ❖ Some SLT Participants shared that it is hard for some staff to NOT see some of the decisions and changes being made as backsliding and reactive to the federal administration.

Future Vision for Racial Equity

1. Outcomes Orientation

- ❖ Focus on outcomes
- ❖ Deliver promised outcomes for communities across the region
- ❖ Evaluate impact of racial equity work

2. Collective Ownership

- ❖ All Metro staff own DEI work
- ❖ Racial equity embedded in agency's everyday work

3. Clarity on Scope and Roles

- ❖ Defined scopes of work for each department
- ❖ Clarity on diverse role contributions to racial equity
- ❖ Establish a poverty to prosperity initiative

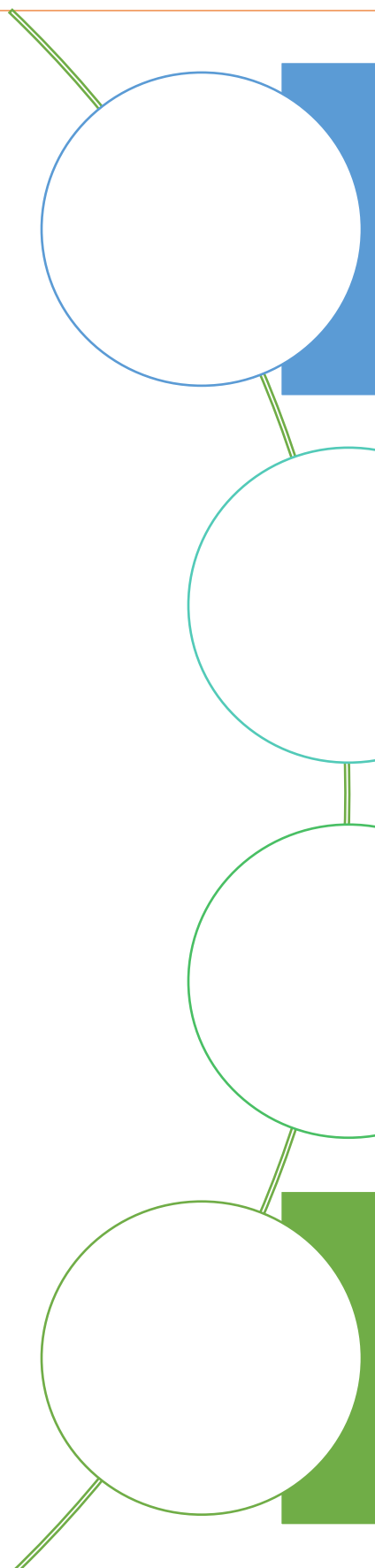
4. Shared Leadership

- ❖ More outspoken leadership and support for risk taking
- ❖ DEI staff and programs empowered to drive accountability and outcomes
- ❖ Implementation urgency

5. Behavior Support Tools

- ❖ New and updated toolkits that, support equitable conversations, calling each other in, and drive outcomes

Future Vision for Racial Equity – 6. Targeted Universalism



TU was originally included in SPAREDI; however, it was inaccurately defined and is discussed across Metro in contradicting ways which could be cause of confusion.

Participants across stakeholder groups rate TU familiarity between 1 and 5 out of 10.

Some Participants envision building familiarity with and adopting TU with universal goals for the region developed plus specific strategies for every part.

Other Participants fear that a shift to TU can risk feeling like race erasure and backsliding.

6. Targeted Universalism – Considerations

Opportunity and Alignment

- Ideas for the future of racial equity at Metro have the opportunity to be antidotes for challenges and barriers:
 - Respond to barriers and challenges
 - Leverage strengths and build on achievements
 - Scaffold the transition of racial equity into its next iteration
- First 5 ideas align with the 6th – Targeted Universalism
- 4 of 5 ideas for the future are a natural part of Targeted Universalism implementation

Challenges to Address

- If Metro decides to adopt Targeted Universalism as a part of its future racial equity approach, successful application will require addressing the misunderstanding and misuse of TU within Metro.
- Need to address concerns raised about Targeted Universalism and build trust that the adoption of TU IS Metro remaining committed to racial equity.



Next Steps

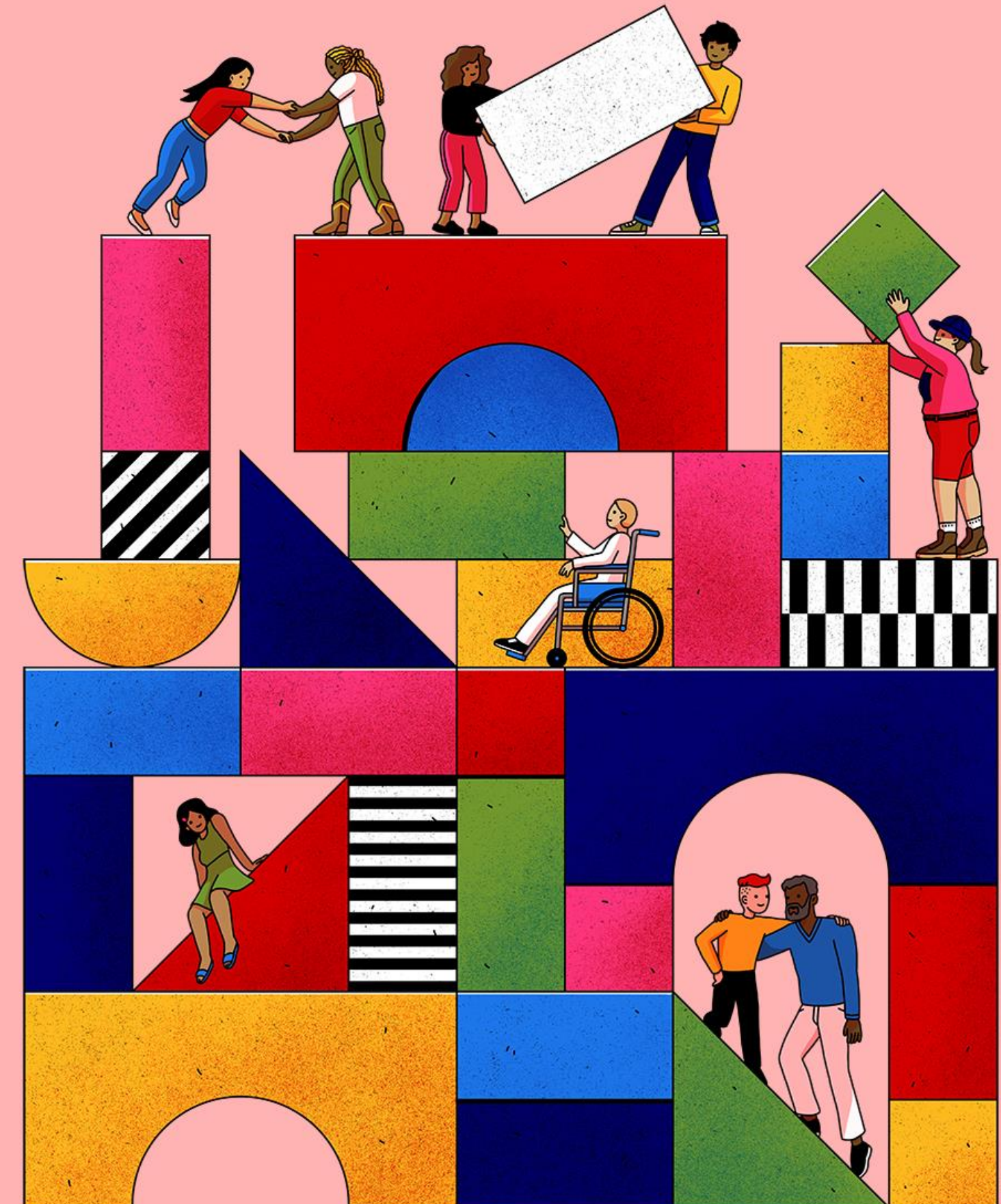
PAT Meeting Three (October 15th) –
Feedback on Retreat Arc

PAT Meeting Four (November 3rd) –
Feedback on agendas for Retreats #1
& #2, discuss #3 & #4

Retreats #1 & #2 –

- RELT Nov 10th & 12th
- CORE Nov 14th & 15th

WE BUILD IT TOGETHER



Thank You!

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Ratna Sinroja

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**Targeted Universalism
Learning &
Alignment Project
All Stakeholders
*Retreat 5 - Day Two***



April 2, 2026

Welcome Everyone!



Retreat 5, Day Two Objectives

- 1) Align on Metro's future approach to racial equity to inform the refreshed SPAREDI.
- 2) Engage in relationship and trust building

Agenda

1. Warm Up Activity
2. Activity: Problem Solving through TU
3. Break
4. Consider Proposed Racial Equity Approach
5. Lunch and Energizer Activity
6. Setting Up Our Approach to Racial Equity for Success
7. Next Steps and Close

Art Credit: [Camila Leão](#) for [Fine Acts](#) x [OBI](#)

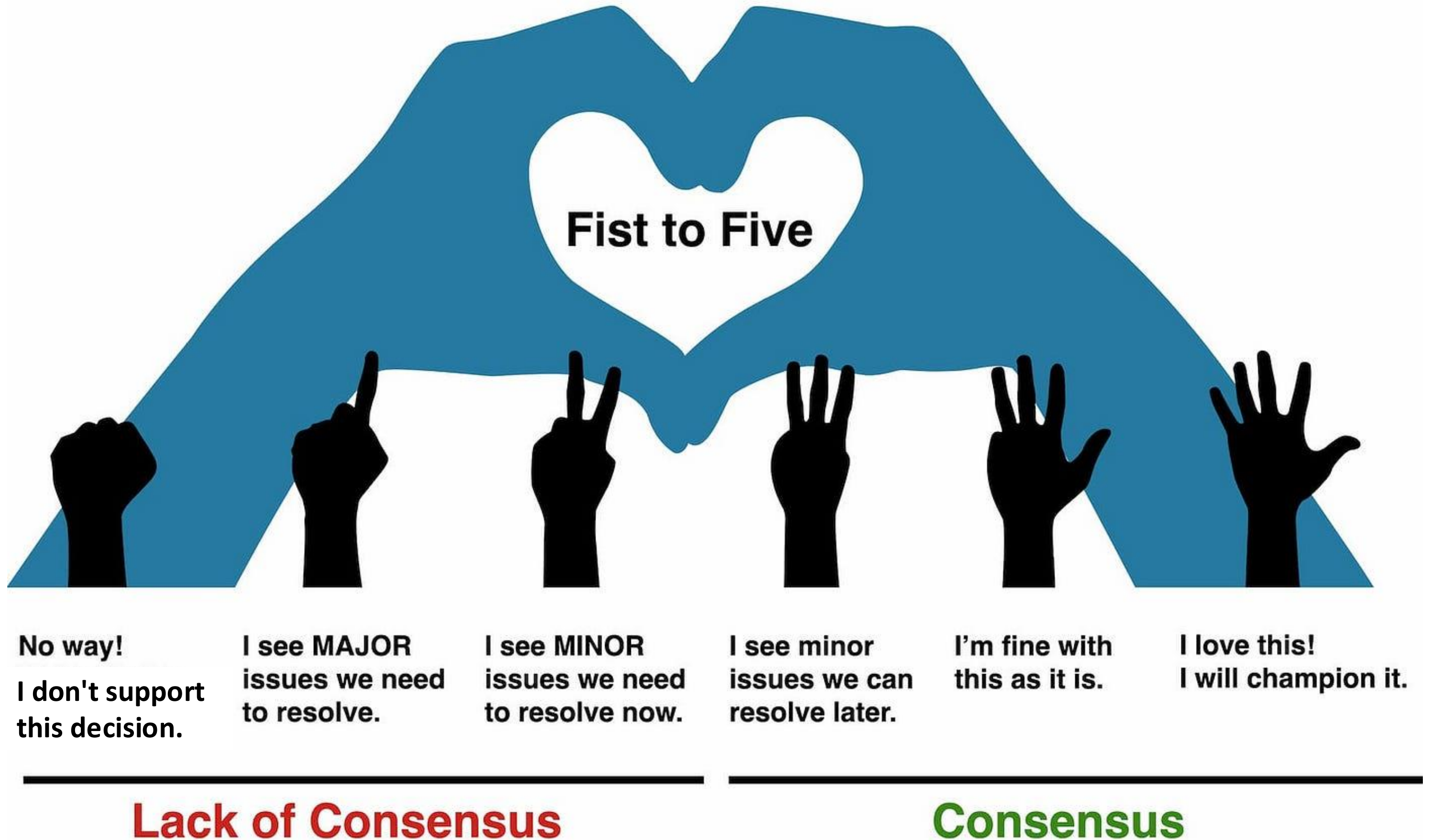


Proposed Norms for Retreat 5

1. **Center Purpose**: Center the process purpose, retreat objectives and today's agenda in your questions, comments and votes, use the virtual and paper bike rack to capture unrelated items.
2. **Practice Deep Presence**: Show up fully, listen deeply, and balance making space for others with sharing transparently.
3. **Commit to Common Solutions**: Leverage your practice in deep presence to lean into common ground and compromise when needed, resist the urge for perfection and push through stuckness if it arises.
4. **Trust the Process**: Trust each other and facilitators, leverage this opportunity to deepen trust within your team.
5. **Maintain Safety and Confidentiality**: Support psychological safety by keeping personal information confidential.
6. **Value Diverse Expertise**: Honor the expertise, intuition, and lived experience of all stakeholders, check your authority while maintaining your unique line of sight.
7. **Practice Brave Vulnerability**: Be honest and curious, share what is truly on your mind and heart, and challenge ideas rather than individuals.
8. **Bridge Perspectives and Prioritize Well-being**: Be open to changing your mind based on new information, verify understanding during conversation and actively practice joy and self-care.
9. **Use Virtual Tools**: Leverage the Menti and virtual comment and bike rack tools to share questions, comments and ideas.
10. **Enjoy the Toys and Conversation**: Enjoy this opportunity to reflect, think strategically, build common ground with you team members, and enjoy the toys and tools in the center of the table!

Approach to Consensus

Retreat Tools



Approach to Consensus

Is there consensus on the Norms?



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Waiting for participants

0- No way! I don't support this

1- I see MAJOR issues we need to resolve

2- I see MINOR issues we need to resolve now

3- I see minor issues we can resolve later

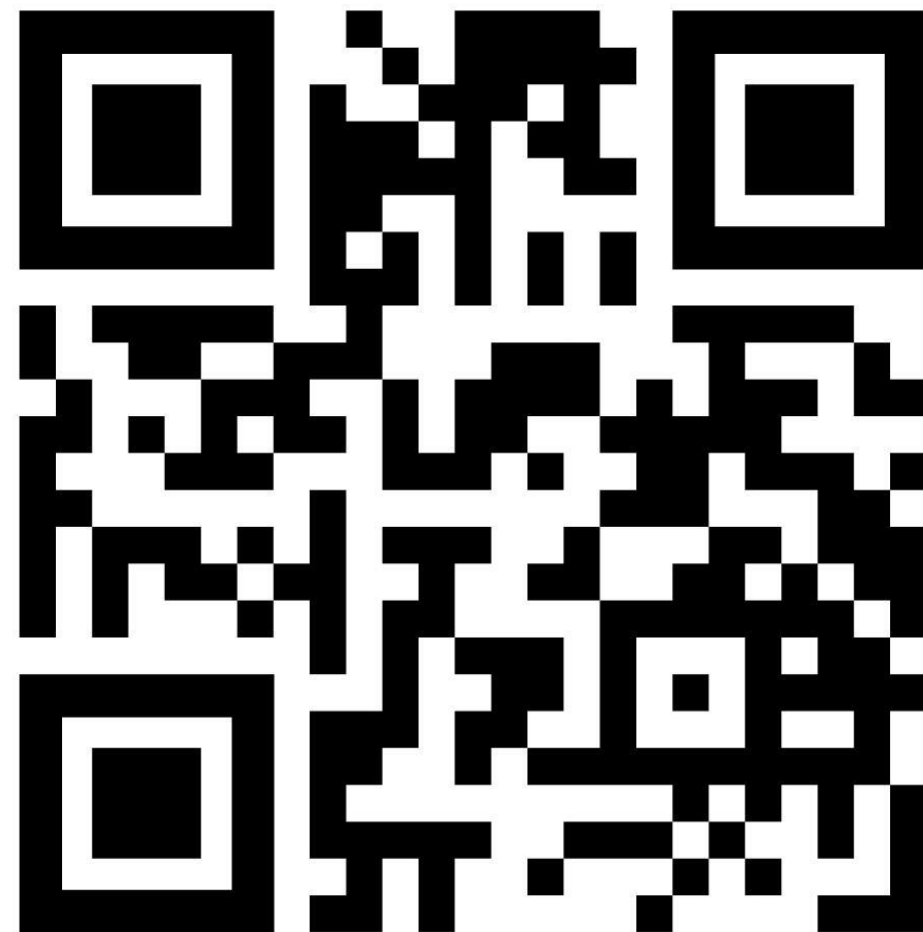
4- I'm fine with this as it is

5- I love this! I will champion it

Bike Rack and Comments

Please use the QR Code located at the center of your table to insert any comments, questions, and/or add to the bike rack.

- Live comments and questions will be monitored by the Seed team and are for resolvable concerns that can be addressed in real time.
- The bike rack items will be addressed at a later date or through a separate process.



Grounding through Self Check-In

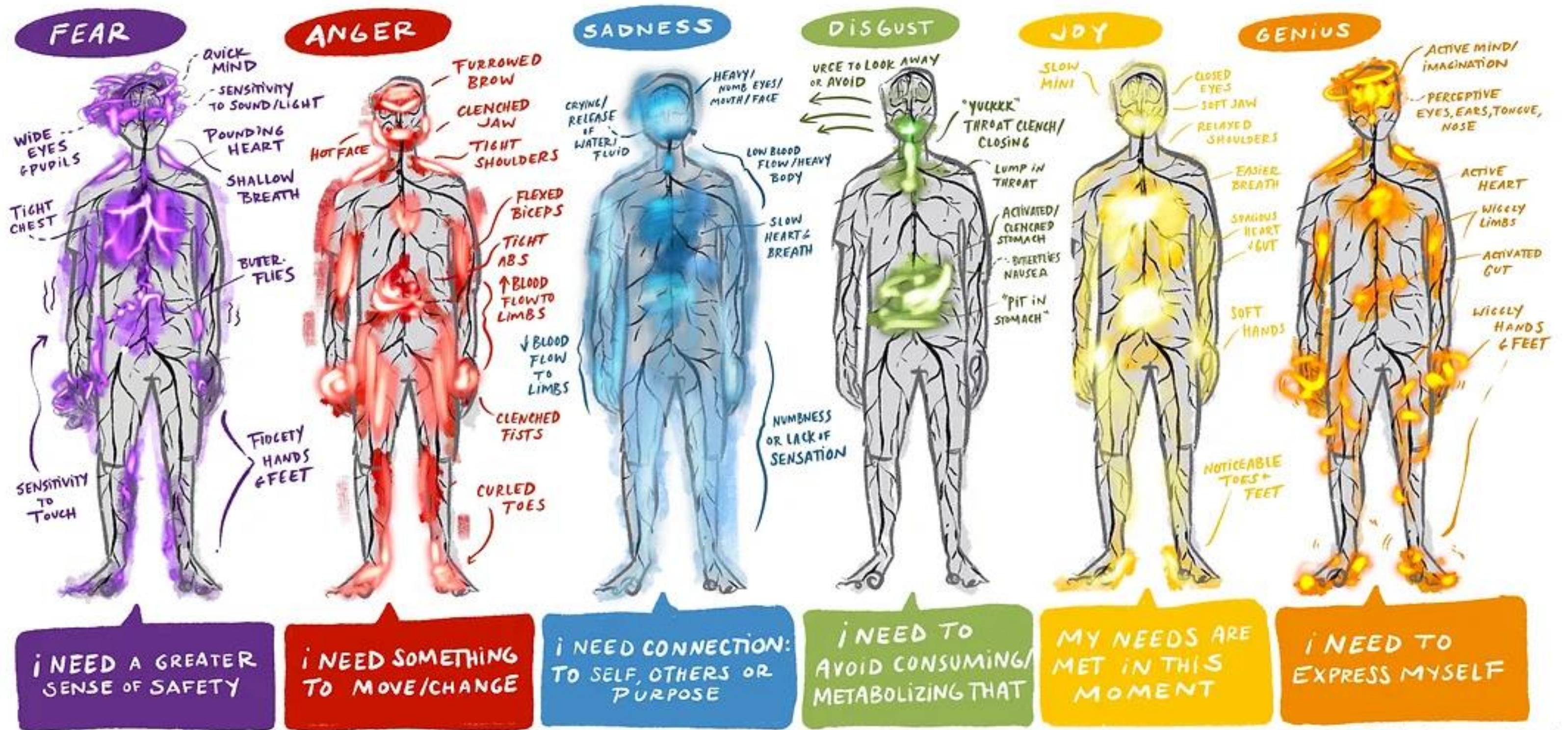
The Emotion Wheel is intended as a tool to support you to sit with and move through discomfort by assisting you with grounding, clarifying, and processing your emotions/emotional response.

- You can identify your feeling on the wheel, track that feeling to the core emotion within the same color block and ask yourself, “why do I feel this way?”
- You can make note of your emotions and how they change throughout the meeting.
- You can use this tool in your daily work or life and in other meeting spaces.



Grounding through Self Check-In

Retreat Tools

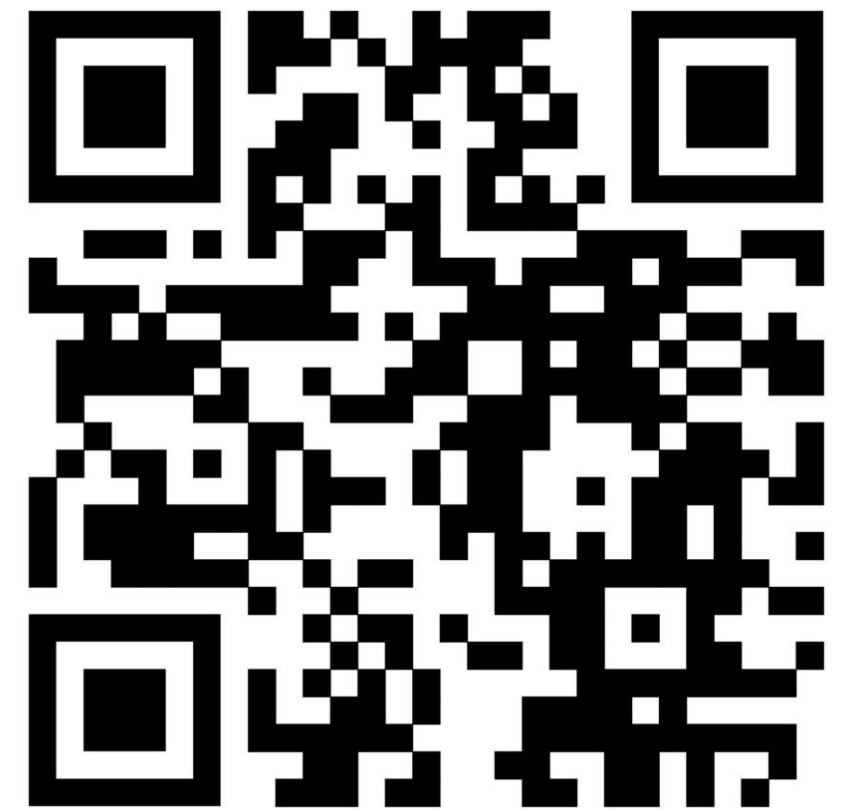


@AVANMUIJEN

The Ones That Take Us Back

What is that one song that gives you the power to time travel? The song that whenever it plays you are transported to a specific memory. Where and what memory is it taking you back to?

- **Take a minute to think about your song**
- **Find a partner, someone you don't know or rarely get the opportunity to speak with**
- **In your pair share, share a few seconds of your song on your phone, sing, or hum & share the memory that it brings up and listen to your partners**
- **Repeat this with 2-3 partners**



Problem Solving through TU

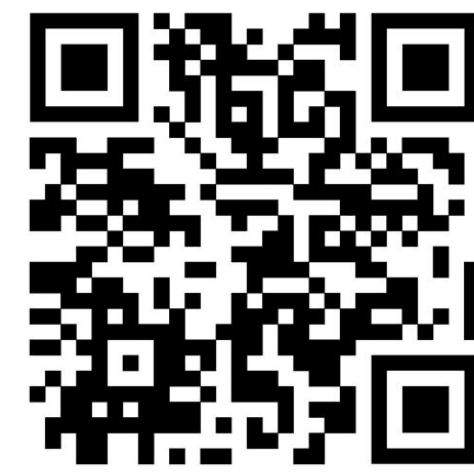


**TO GO FAR,
GO TOGETHER**

Reminder: Seven Stages of Targeted Universalism

1. Co-create a universal goal based upon a broadly shared problem and collective aspiration
2. Assess the general population's performance relative to the universal goal
3. Assess all segment groups' performance relative to the universal goal and situatedness
4. Assess and understand the structures and systems that support or impede each group from achieving the universal goal
5. Develop and implement targeted strategies so all groups reach the universal goal
6. Develop belonging/bridging stories, narratives, and messaging that support strategies
7. Conduct ongoing evaluation/measurement of impact relative to Universal Goal

Case Study Activity Instructions



1. Identify a scribe and facilitator

2. Review the case studies one at a time and in your group answer the following questions:

- What resonates with you or excites you about the case studies?
- What about the case studies sparked our curiosity?
- How did the case studies spark your imagination about the application of TU at Metro?
- What are some easy wins and opportunities to apply TU or deepen the application of TU at Metro?

3. Scribe

- Please take notes in the Google document assigned to your table. Please make note of any questions related to the TU framework

Activity Instructions Continued

2. When instructed,

- Scribe posts at least one opportunity to implement TU on menti.com from the group conversation and any lingering questions on the TU framework
 - Use QR Code on the right
 - Or visit menti.com and input the code

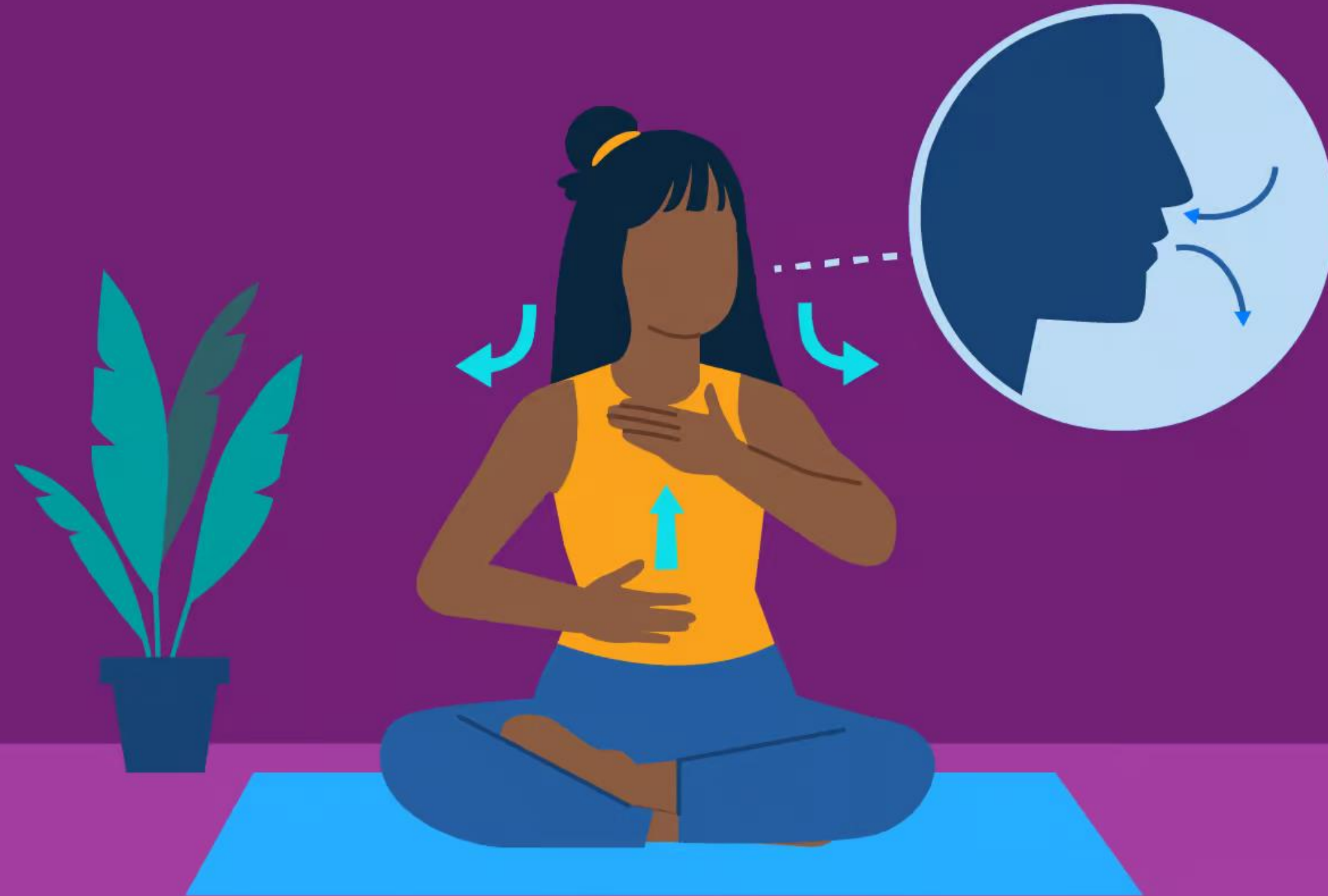
3. Large group share

- What excited you or stood out from your small group conversation?
- What lingering questions about TU do you still have?



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SOMATIC BREATHING

is an exercise that helps regulate the autonomic nervous system.

Align on Recommendation: Future Approach to Racial Equity

Art Credit: [Teo Georgiev](#) for [Fine Acts](#) x [OBI](#)



Reminder: Consensus Summary for Retreats 1-4

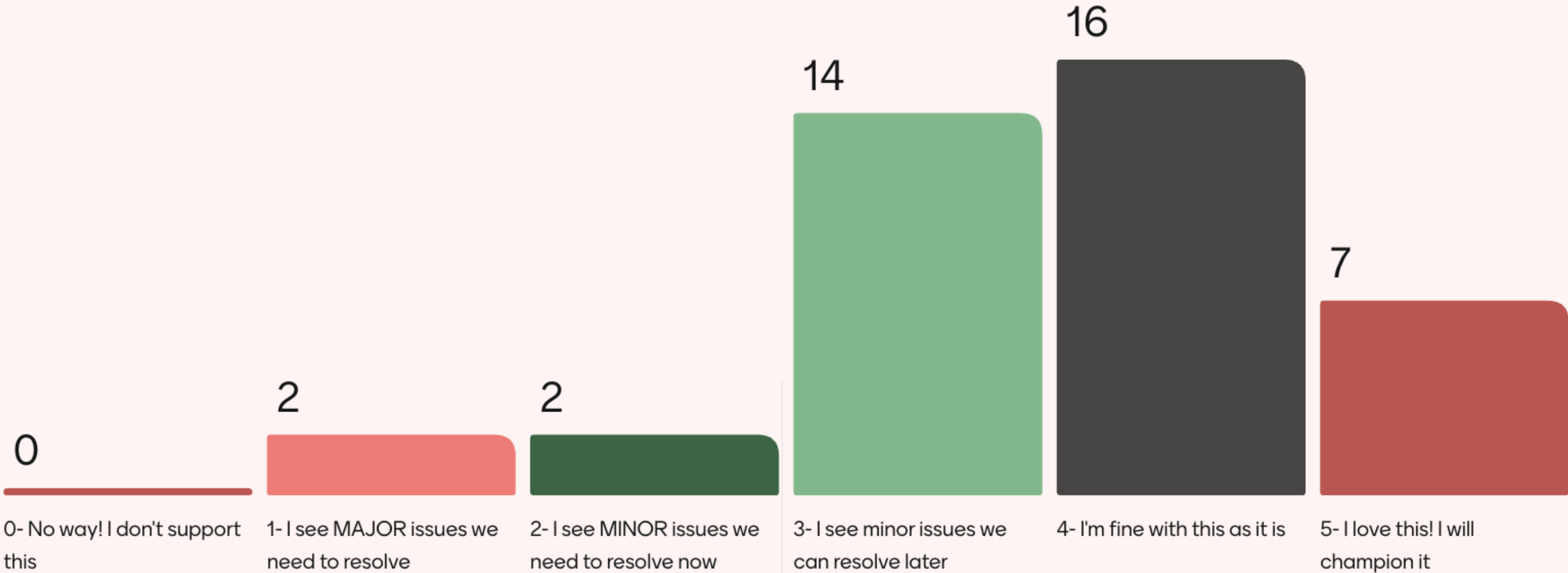
Stakeholder	Racial Equity Approach
RELT	All small groups reached consensus and included TU and leading with race in their recommendation. Ran out of time for large group discussion.
CORE	Reviewed RELT's work and made additions. Consensus reached.
Council	Reviewed RELT & CORE's work and made additions. Consensus reached.
SLT	Reviewed RELT, CORE, and Council's work and made additions. Consensus reached.

Seed's Proposed Approach for Metro

**Racial Equity
through a Targeted
Universalism
framework**

Day 1: RELT & SLT Vote

Is there consensus on the racial equity approach?



Instructions

Our Goal By Lunch: Affirm alignment on the approach



1. Identify a scribe and facilitator

2. At your table, discuss the following questions:

- What excites you or makes you hopeful about the proposed approach?
- What about the proposed approach sparks your curiosity?
- What lingering concerns do you have about the approach that need to be addressed in order for you to give the proposal a 3, 4, or 5 level of agreement?

Instructions Continued

2. When instructed

- Scribes (and others if desired) post any resolvable questions or concerns with proposed approach on menti.com
 - Use QR Code on the right
 - Or visit menti.com and input the code
- If desired post any other desired items on the bike rack



menti.com
3733 5029

Instructions Continued

3. Large group discussion

- A few popcorn share backs
 - What stuck out most during your small group's conversation?
- Together we will address submitted resolvable concerns
- Fist to 5 consensus poll

Proposed Approach for Metro

**Racial Equity
through a Targeted
Universalism
framework**

Large Group Discussion



Consensus Vote on Approach Recommendation



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0

0- No way! I don't support this

1- I see MAJOR issues we need to resolve

2- I see MINOR issues we need to resolve now

3- I see minor issues we can resolve later

4- I'm fine with this as it is

5- I love this! I will champion it



A close-up photograph of a woman with dark hair and brown eyes, wearing a red top. She is looking intently at her left wrist, which has a red watch with a yellow dial. Her right hand is raised, with her index finger pointing towards the watch. The background is plain white.

TIME FOR AN

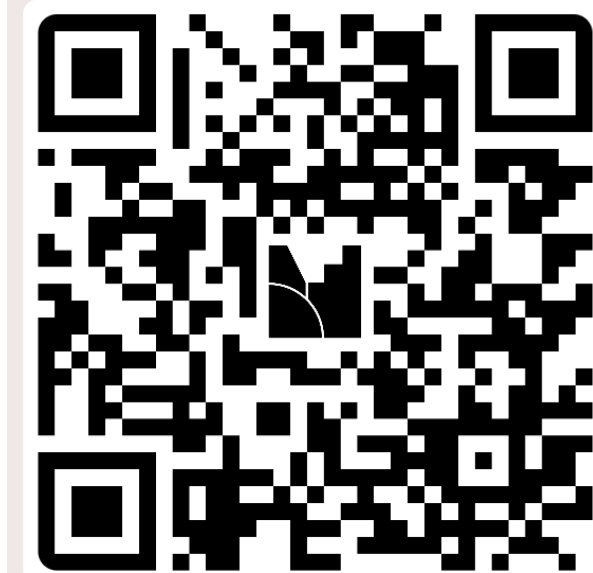
ENERGIZER!

“For Sale: Baby Shoes. Never Worn.”

- ❖ What is your six-word story of Metro as it is today?
- ❖ What is your six-word story of what Metro can be?
- ❖ You'll have 5 minutes to write your stories. Please include them in the Google document.
- ❖ Five minutes to share your six-word story of what Metro can be with your table. Everyone will share.
- ❖ We will have 2-3 volunteers for large group

For sale: baby shoes,
never worn.

— Ernest Hemingway



Culture Recommendation Report Out From Day One



**TO GO FAR,
GO TOGETHER**

Revised Proposal

Culture Change Guiding Principles

1. Clarify Decision-Making Structures
2. Communicate to Improve **Clarity and Transparency**, and Build **Trust Relationships**
3. Foster a Culture of Feedback and Iteration
4. **Foster Shared Learning, and Growth**

Setting Up Our Approach to Racial Equity for Success



Instructions

1. **Round One**: Start by going to the paper on the wall closest to your table to collaboratively discuss your first question
2. **Round Two**: When time is called, head to your next small group and discuss your second question
3. **Round Three**: When time is called, head to your third and final small group and discuss your third question

Instructions

Discussion Questions:

- By 2036, what racial equity achievements will Metro have made (focus on outcomes/results/impact)?
- What must Metro do to successfully apply racial equity through a TU framework?
- How must we support each other and behave with each other in order to successfully apply the proposed approach and achieve the outcomes we seek?

Next Steps and Adjourn

- Thank you! We did it!
- Celebration and Reflections
- Next Steps



Thank You!

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Rio Gonzalez

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Metro



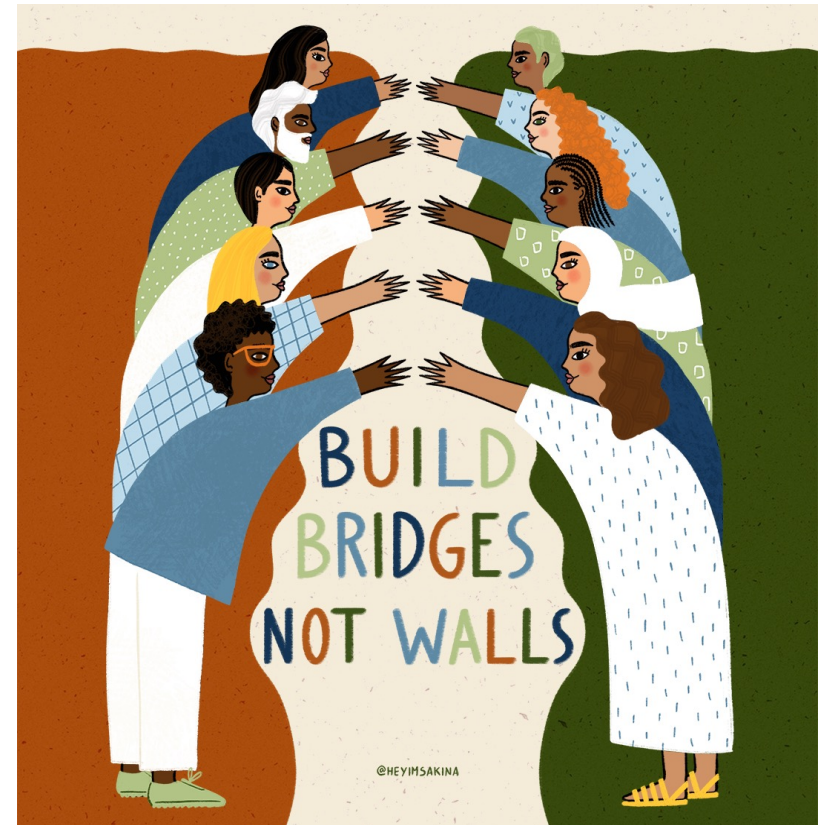
Targeted Universalism Learning and Alignment Retreat Proposals & Process Summary



March 2026

Reminder: Project Overview

- **Project purpose**
 - Clarify and align Metro's approach to racial equity in support of the new/refreshed DEI strategy.
 - Develop a common understanding of Targeted Universalism (TU), its application and how it aligns with racial equity.
- **Project scope**
 - Four stakeholder specific retreats (one for each stakeholder group).
 - One joint stakeholder retreat to align around racial equity approaches at Metro and whether this approach includes TU.
 - Recommendations for Council's final decision.



Stakeholder Retreats To Date



Outcomes of Retreats 1-4

All Stakeholders:

- Discussed Metro's future approach to racial equity to inform the refreshed SPAREDI.
- Discussed the DEI Team's role.
- Considered group specific proposals and solution ideas in response to the Racial Equity Assessment.
- Received training on Targeted Universalism (TU) and organizational culture.

Additionally, RELT and SLT:

- Co-created recommendations to address organizational culture specific barriers to the advancement of racial equity at Metro.

Consensus Summary for Retreats 1-4

Stakeholder	Racial Equity Approach	Culture Change
RELT	All small groups reached consensus and included TU and leading with race in their recommendation. Ran out of time for large group discussion.	Consensus reached.
CORE	Reviewed RELT's work and made additions. Consensus reached.	Have not seen.
Council	Reviewed RELT & CORE's work and made additions. Consensus reached.	Have not seen.
SLT	Reviewed RELT, CORE, and Council's work and made additions. Consensus reached.	Reviewed RELT's work and Seed's synthesis and made revisions. Partial consensus reached.

Alignment on Racial Equity Approach Across Stakeholders

Art Credit: [Teo Georgiaev](#) for [Fine Acts](#) x [QBI](#)



RE APPROACHES



STRATEGIES FOR MOVING APPROACHES

- BLDG INFRASTRUCT
- MEASURE PROGRESS
* See Notes
- ACCOUNTABILITY
- CO-CREATING w/ COMMUNITIES OF COLOR RESOURCES

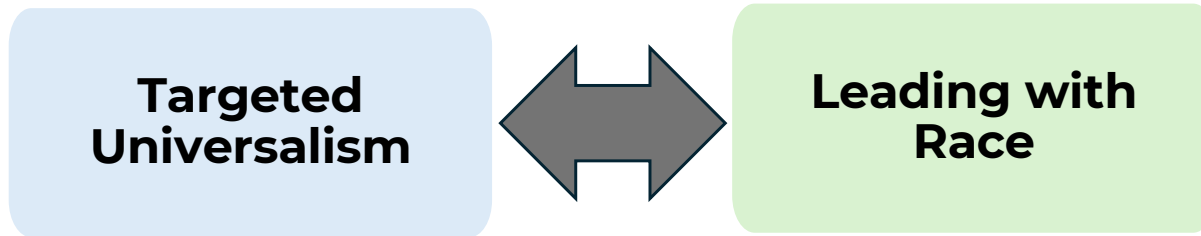
Future Visions
1. Outcome Orientation
- Add the outcome progress (95)
2. Collective Ownership
- could be together (95)
- what are people's priorities? (95)
- what accountability? (95)
3. Shared Leadership
- and leadership should be held accountable for organizing activity in practice - change (95)
4. Resource Support
- hold needs to be modeled from the top (95)

Leading w/ Race - yes
1. TU → Update language used on SEED's approach - high more jobs talk about (95)
2. Infrastructure → Test the infrastructure is TU a way of doing this? Access, evaluate, provide leadership, then implement - This is embedded, do we need more long-term accountability? (95)
3. Partnership of communities of color - shift to a co-creation process of co-creation making a more shared power model - (95)
4. Generating support types
5. Measuring progress - need include accountability - (95)
- need update, transparency around the process, form intergenerational (including) - (95)
- (95)
- (95)
- (95)

RELT Graphic

Inspiration for Approach Diagrammed on following slide

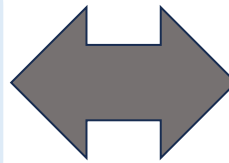
Seed's Interpretation of RELT's Small Group Notes: Racial Equity – Proposed Approach



- A. Collective Ownership + Generating Support**
- B. Build Infrastructure + Clarity on Scope and Roles**
- C. Shared Leadership + Behavior Support Tools**
- D. Partner with communities of color**
- E. Outcomes orientation + Measuring Progress**

CORE & Council Additions to Proposed Racial Equity Approach

Targeted
Universalism



Leading with
Race

Black: RELT
Red: CORE
Purple: Council

- A. Collective Ownership/**Implementation** + Generating Support
- B. **Shared Leadership** + Clarity on Scope and Roles
- C. **Build Infrastructure (including mixed methods data collection and disaggregation)** + Behavior Support Tools
- D. Engage in broad **partnerships with communities of color** ensure engagement in an authentic cross section of Metro's community
- E. Outcomes orientation + Measuring Progress



SLT Retreat Summary for Racial Equity **Proposed Approach**

SLT reframed RELT, CORE, and Council's amended approaches A-E, and recategorized some as either values/principles or tactics.

(As shown in the following slide.)

SLT: Racial Equity – Proposed Approach

Black: RELT
Red: CORE
Purple: Council
Green: SLT

Values and Principles

*Definition: Norms that guide our work
Principles, Values, or Commitments*

Collective Ownership and
Implementation
Inclusion

Center Outcomes/**Impact**
Orientation

Racial equity/justice
(replaces leading with race)

Approaches

*Definition: Structured process and steps
Repeated logic that can be applied consistently*

Targeted Universalism

Tactics

Definition: An action that you take to advance a strategy

Engage in broad partnerships with communities of color and ensure engagement in an authentic cross section of Metro's community

Generating Support among Partners
Create Behavior Support Tools

Clarity on Scope and Roles
Shared Leadership
Building Infrastructure
(including mixed methods data collection and disaggregation)



Seed's Proposal
Racial Equity Approach
for All Stakeholders' Consideration

**Racial Equity through
a Targeted Universalism
framework**


Update and Alignment on Culture Change Recommendations Across RELT and SLT

Art Credit: [Camila Leão](#) for [Fine Acts x OBI](#)



Culture Recommendations Process Overview

- RELT laid the groundwork by engaging in robust small and large group discussions, reaching consensus on 38 culture change recommendations to address issues of stuckness, communication and transparency, and perfectionism and performativity raise in Seed' Racial Equity Assessment.
- Seed organized RELT's culture recommendations into 5 bucket areas, addressed duplication, and streamlined language for SLT's consideration. SLT reviewed and reach partial consensus during their retreat.
- Following the retreat, SLT formed a committee to complete development of culture recommendations in the form of a guiding principles document.

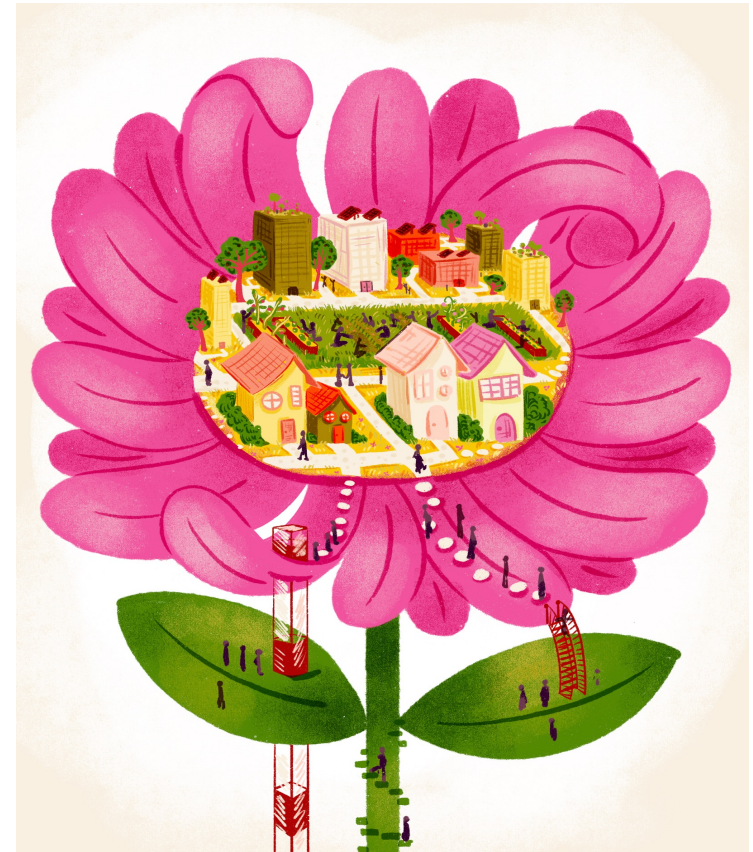


Proposed
Culture Change Guiding Principles
for RELT and SLT's Consideration

- 1. Clarify Decision-Making Structures**
- 2. Communicate to Improve Transparency and Build Trust**
- 3. Foster a Culture of Feedback, Learning, and Iteration**

Plan for **Retreat #5**

Art Credit: [Teo Georajev](#) for [Fine Acts x QBI](#)



Retreat #5 Objectives

Day 1: RELT & SLT Only

- 1) Align on Metro's future approach to racial equity to inform the refreshed SPAREDI.
- 2) Align on recommendations for desired changes to Metro's culture.
- 3) Engage in relationship and trust building

Day 2: All Stakeholders

- 1) Align on Metro's future approach to racial equity to inform the refreshed SPAREDI.
- 2) Engage in relationship and trust building

Retreat #5 Logistics

Who and When

- March 30: RELT & SLT
- April 2: All Stakeholders
- 8:30AM Start Time

Where

- Retreat location: Oregon Zoo

Reminders

- Breakfast and lunch will be provided
- Bring a refillable water bottle

Art Credit: [Pavel Fuksa](#) for [Fine Acts](#) x [OBI](#)



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Breakout Groups in Progress

Audio will resume shortly



Breakout Groups in Progress

Audio will resume at approximately 11:00 a.m.



Breakout Groups in Progress

Audio will resume at approximately 11:00 a.m.



Break in Progress

Audio will resume shortly

