Council work session agenda

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

Tuesday, December 9, 2025   **9:15 AM**   **Oregon Convention Center RM F150; https://zoom.us/j/615079992 (Webinar ID: 615079992) or 253-205-0468 (toll free),**

9:15   **Call to Order and Roll Call**

10:00   **Targeted Universalism Discussion**

11:00   **Break**

12:15   **Targeted Universalism Discussion, Continued**

12:45   **Lunch Break**

1:30   **Targeted Universalism Discussion, Continued**

4:00   **Adjourn**

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលពាក្យបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។ បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលមន្ត្ ប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ព្រាំថ្ងៃ ថ្ងៃធ្វើការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

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January 2021

Materials following this page were distributed at the meeting.

TU Learning & Alignment Project Council
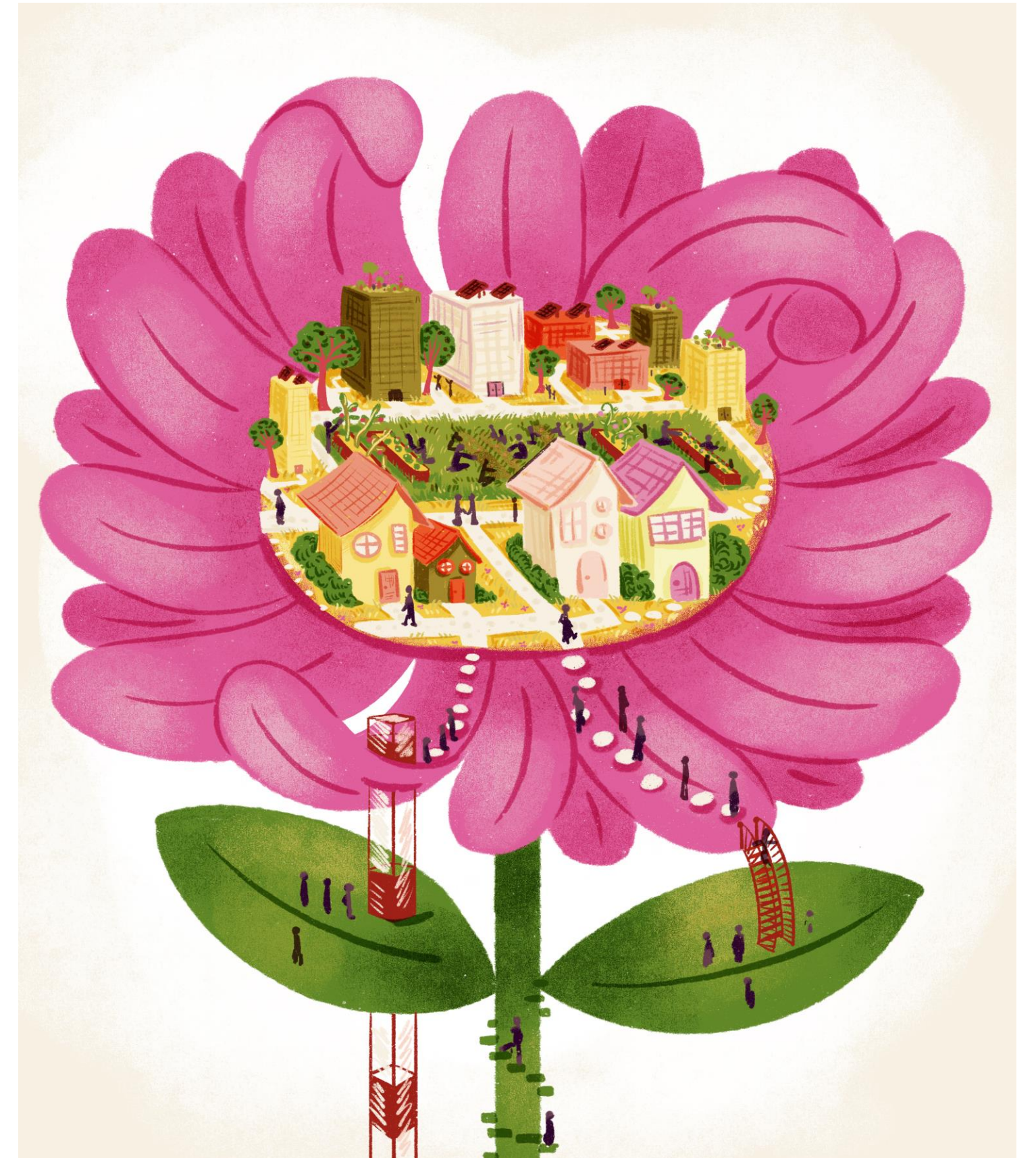
Retreat Day One

December 9, 2025

Welcome Everyone!

Art Credit: Teo Georgiev for Fine Acts x OBI

Reminder: Project Purpose

- **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 joint stakeholder retreat to align around racial equity approaches at Metro and whether this approach includes TU.
  - Recommendations for Council's final decision.

- **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.
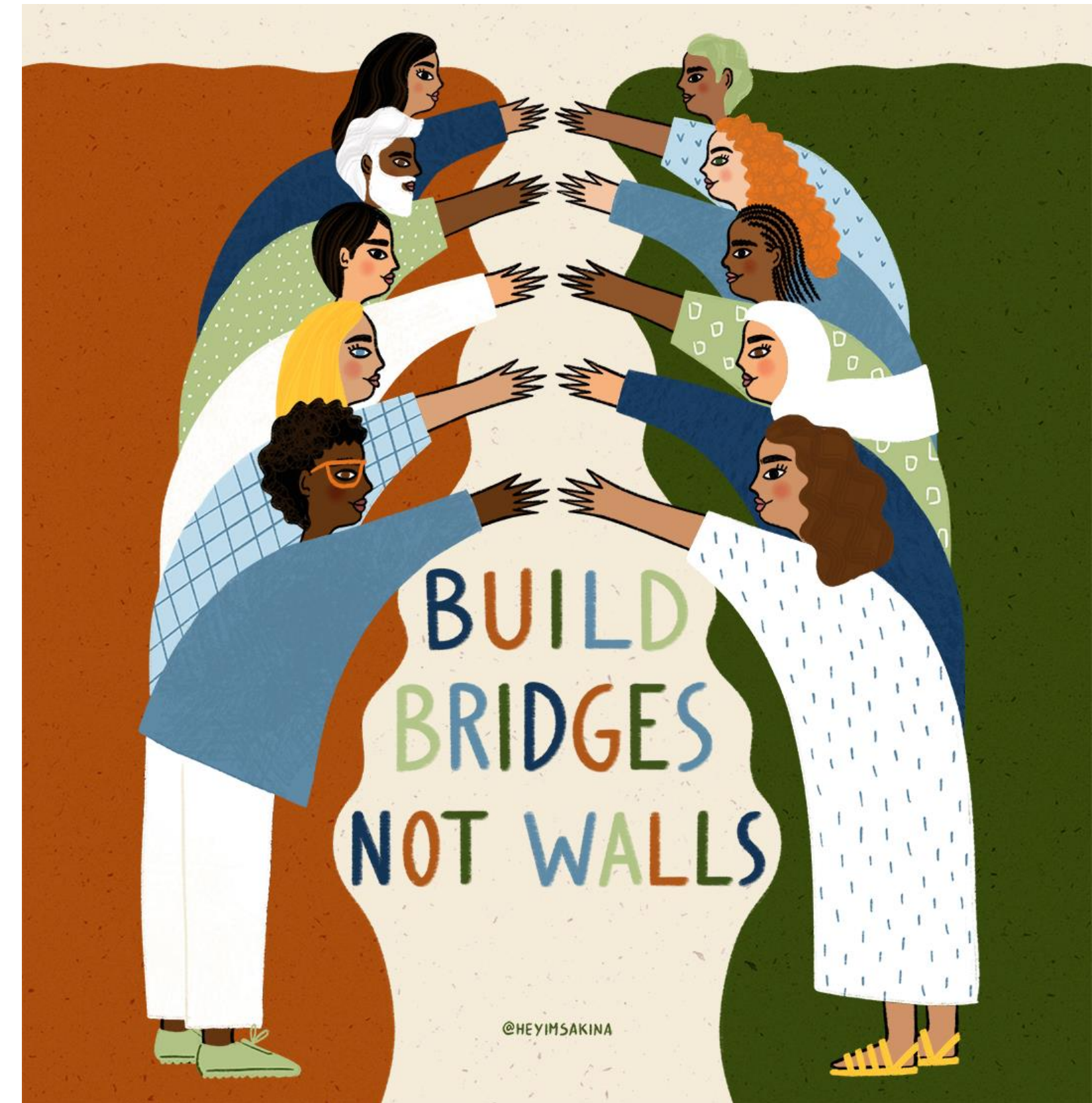
BUILD BRIDGES NOT WALLS

@HEYIMSAKINA

Stakeholder Groups

- Committee on Racial Equity (CORE)

- Metro Council (Council)

- Racial Equity Leaders (RELT)

- Senior Leadership Team (SLT)

Approach to Project Advisory Team Design

- **Inclusion**: The action of inviting individuals or groups into environments and spaces from which they have been historically or are persistently excluded. Inclusion is typically important in spaces of influence, power or prestige.

- **Co-Creation**: An inclusive, collaborative processes that invites a diverse group to use information to ideate, design, and develop strategies or solutions together. It is a process where everyone contributes, and you have a voice in the outcomes that affect you.

- **Shared Leadership**: The act of sharing power and responsibility with a diverse group across lines of authority to shape meaningful ideas, actions and decisions.

Retreat Objectives

All Stakeholders

- Baseline understanding of Targeted Universalism (TU) as well as organizational culture and how to change it.

- Agree on desired changes to Metro's culture based on aspects of culture identified in the Assessment.

- Agree on Metro's future approaches to racial equity to inform the refreshed SPAREDI.

Council

- Clarify how Council will apply its decision-making role to advance racial equity and reinforce accountability to the refreshed SPAREDI.

- Identify how to provide Council with the most effective, concise, and actionable information and engagement opportunities to support clear, consistent leadership amid their constrained time and competing priorities.

- Clarify how Council will receive and consider advice from CORE.

SEED COLLABORATIVE

Retreat Day One

- Baseline understanding of Targeted Universalism (TU), and organizational culture and how to change it

- Assessment presentation and discussion

- Consensus building – Recommendations on Council Objectives

Agenda

1. Training on Targeted Universalism

2. Assessment Presentation & Mini Org Culture Training

3. Assessment Discussion

4. Lunch Break

5. Recommendations on Council Objectives

   a. World Café Brainstorm

   b. Gallery Walk + Consensus Aliggment

6. Next Steps and Adjourn

Art Credit: Camila Leão for Fine Acts x OBI

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.

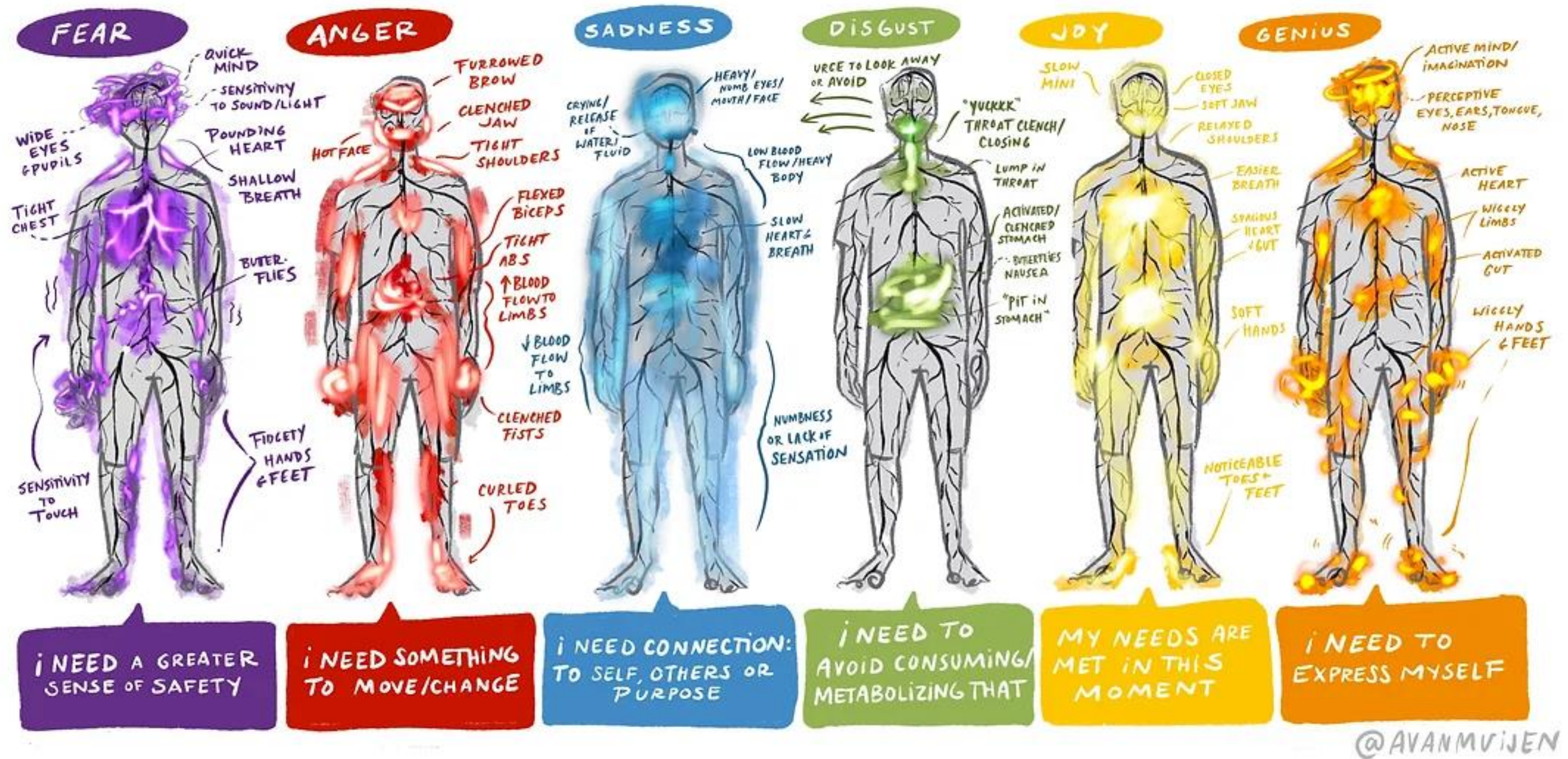- You can use this tool in your daily work or life and in other meeting spaces.

The Emotion Wheel by Abby VanMuijen

Grounding through Self Check-In

The Emotion Wheel by Abby VanMuijen

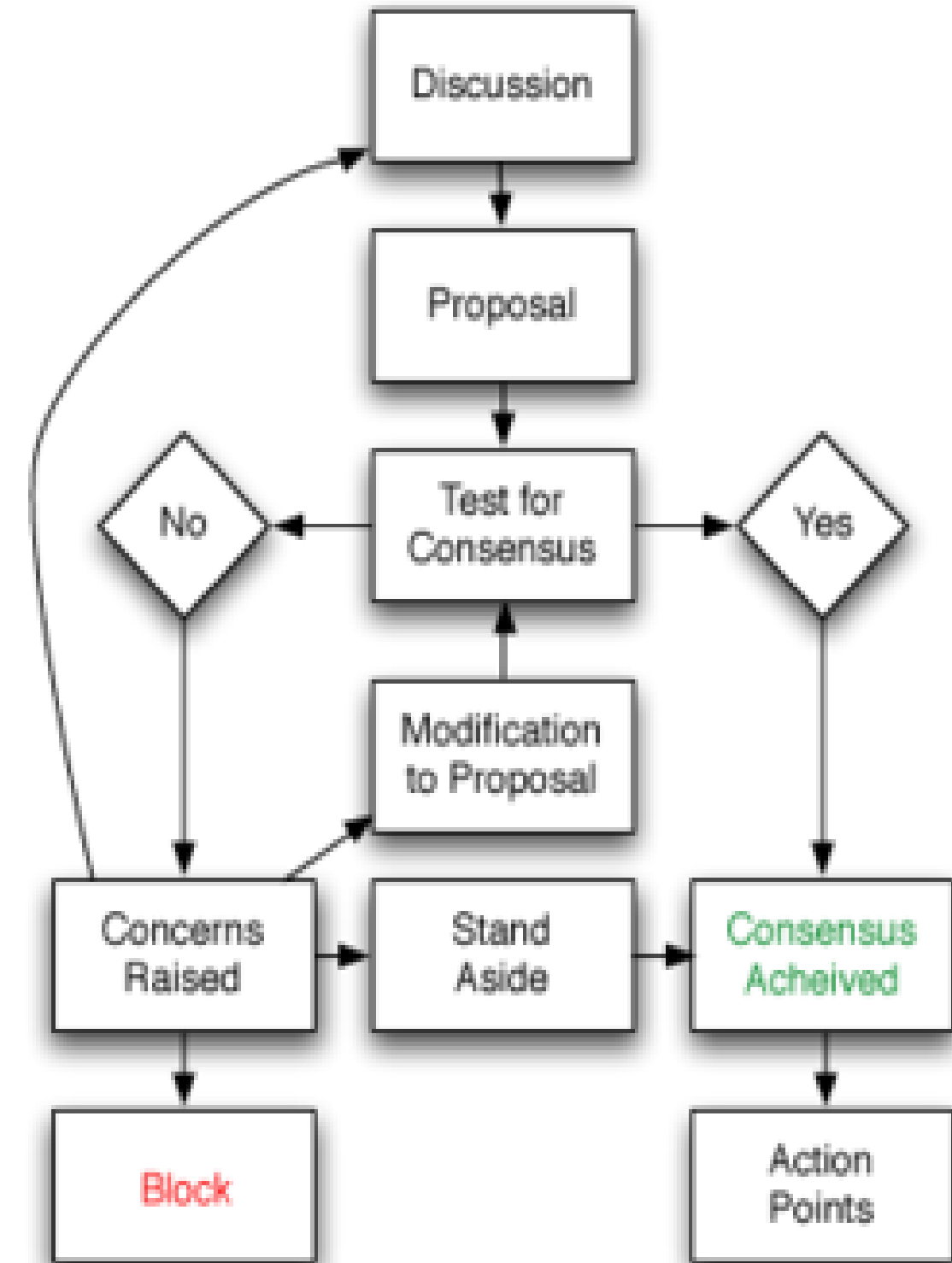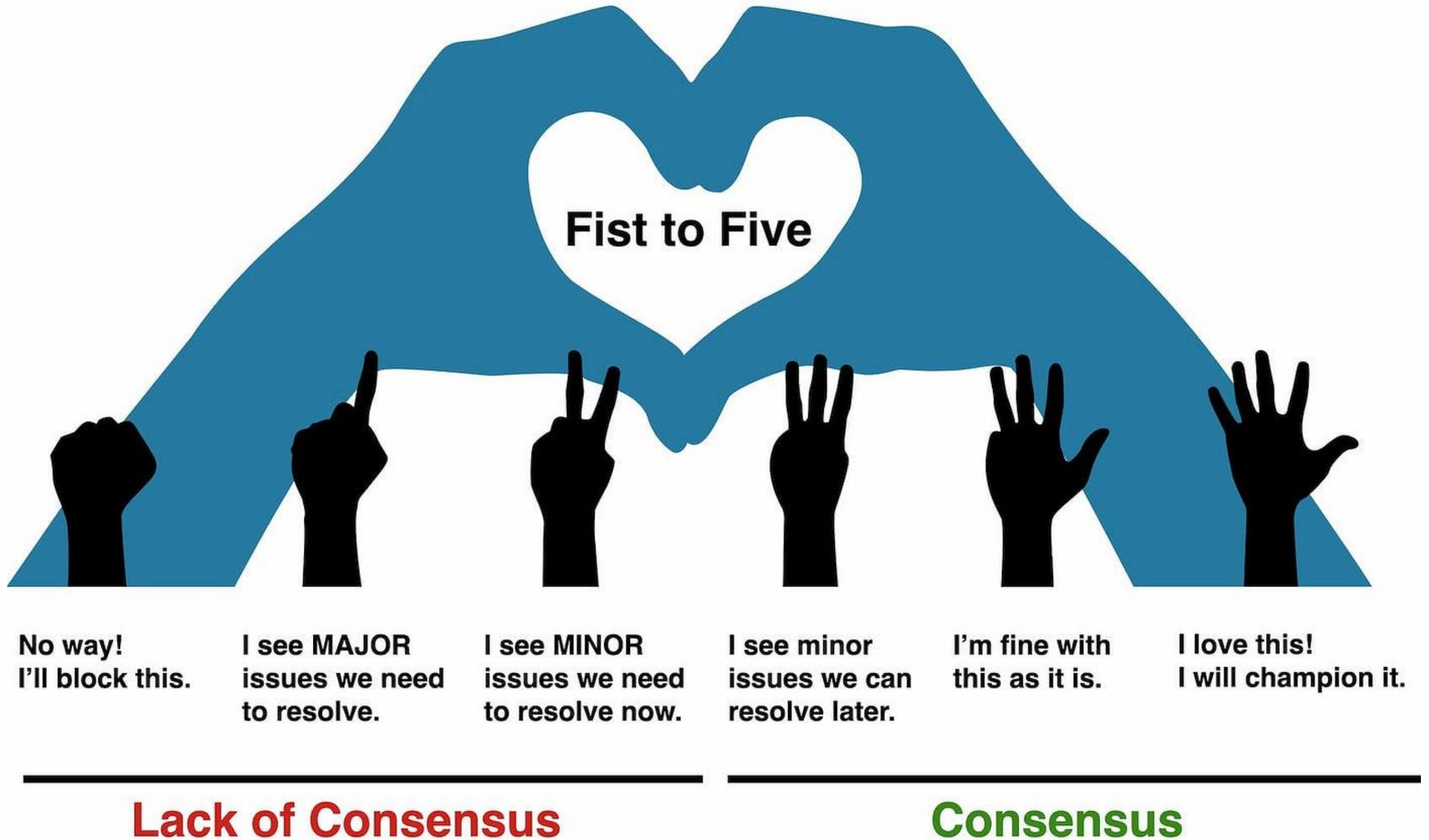# Consensus

A practice that supports all members of a group to contribute to a shared proposal and shape it until it **generates widespread agreement and meets the concerns of participants** to the extent possible.

- Consensus is an example of shared leadership in practice and honors inclusion and co-creation.

- The PAT has been using "simple consensus": we all agree, or we do not move forward.

Approach to Consensus

Fist to Five

No way! I'll block this.

I see MAJOR issues we need to resolve.

I see MINOR issues we need to resolve now.

I see minor issues we can resolve later.

I'm fine with this as it is.

I love this! I will champion it.

Lack of Consensus

Consensus

Proposed Retreat Norms

1) Center the purpose of the project and objectives of the retreat

2) Listen deeply, show up fully, make space, share space

3) Trust the process, each other, the facilitators, and yourself

4) Keep the work in the process

5) Keep mindful that this is a public meeting being recorded in the age we live in ~~personal information confidential, share ideas (supporting safe space)~~

6) Commit to common solutions, be willing to compromise

7) Value the experience and intuition of ~~others,~~ all stakeholders

8) ~~Check your authority~~ Maintain ~~but not~~ your line of sight (information, perspectives)

9) Be vulnerable, honest, brave, curious, and willing to sit with discomfort, ensure you share all that is on your mind and heart, don't leave deep perceptions unexpressed

10) Be open to changing your mind in view of new information, bridge across diverse opinions and viewpoints

11) Verify that you understand what is being said esp if there is a gap in perspectives (ensure aligned/same understanding)

12) Keep short and long term impact in mind

Warm Up Activity

Share the story behind one of the following:

- Your first or last name

- A nickname you've been given

- A name you've given to someone, a plant, a pet, or even your Wi-Fi or sourdough starter

➤ **Take 2 minutes to think about your story.**
➤ **Take 4 minutes to share your story.**
➤ **Both partners share.**

Training on Targeted Universalism

TO GO FAR,
GO TOGETHER

TU Kahoot!

Head to www.Kahoot.it
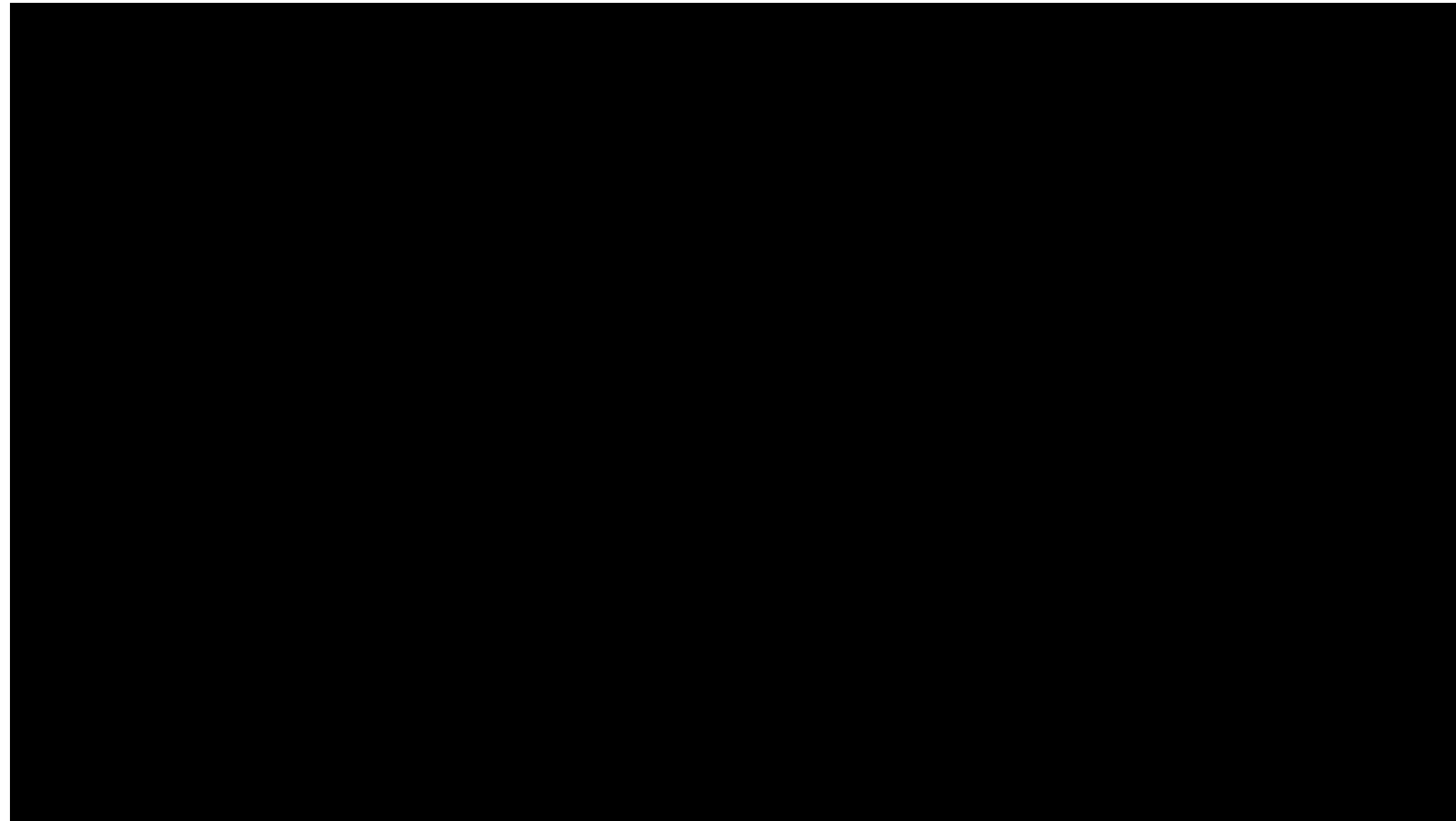
Targeted Universalism

TU is an <u>equity framework</u> that is applied to reduce structural, systemic and cultural inequity and advance care, opportunity and belonging for all. TU is also an experience of practicing belonging.

A Word from the TU Architect john powell

Targeted Universalism (TU)

TU is a process of co-creating and pursuing <u>shared universal goals</u> through <u>targeted strategies</u> focused on system and culture change, with the intent to move all groups to a common aspiration.

- TU is **outcomes-oriented, bases achievement on results.**

- TU recognizes that we are all **situated differently** but that we are all part of the same social fabric.

- **Co-creation and data are at the heart** of TU and inform our understanding **of the situatedness of groups.**

- **Targeted strategies are developed based on how different groups are situated within structures and cultures**, to smooth the path to the universal goal.

- Targeted strategies focus on **transformation of systems, structures and/or cultures** in relationship to their impact on different groups.

- The ultimate **result of TU is justice and belonging.**

Targeted Universalism is....

Transformational
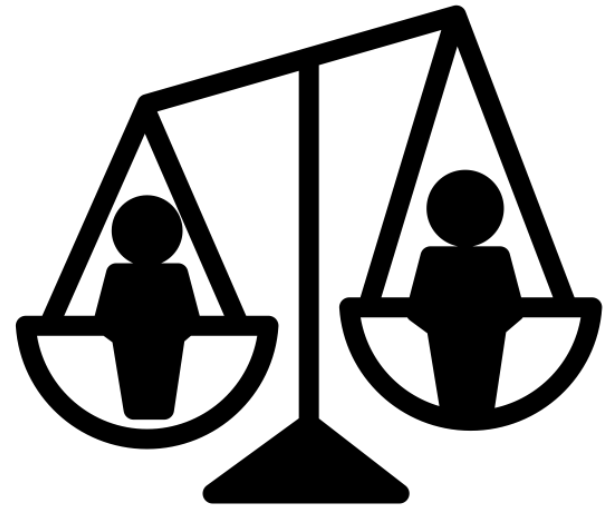
Created by Creative Mania
from Noun Project

Created by Nithinan Tatah
from Noun Project

Focused on **durable inequity**.

Focused on **power**.
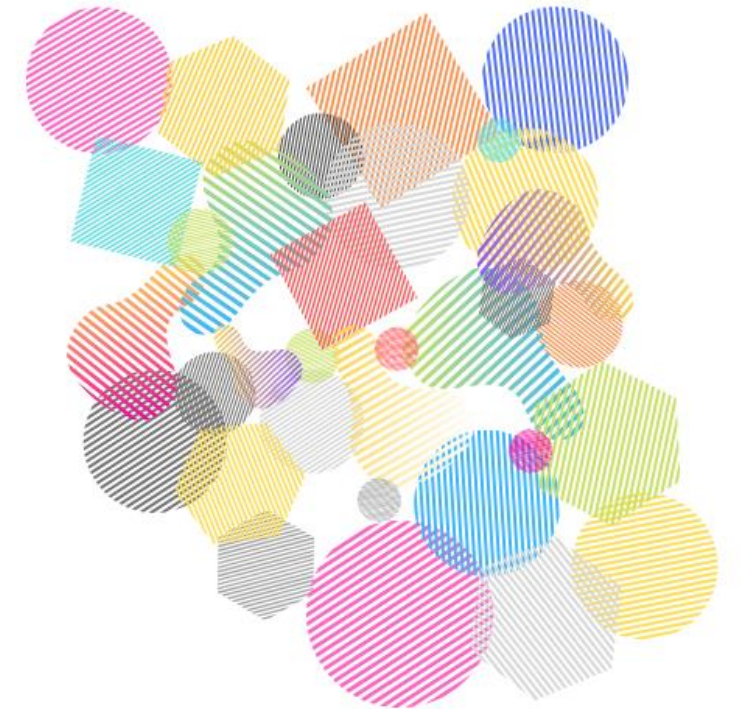
Focused on **outcomes.**

Targeted Universalism is not....
Transactional
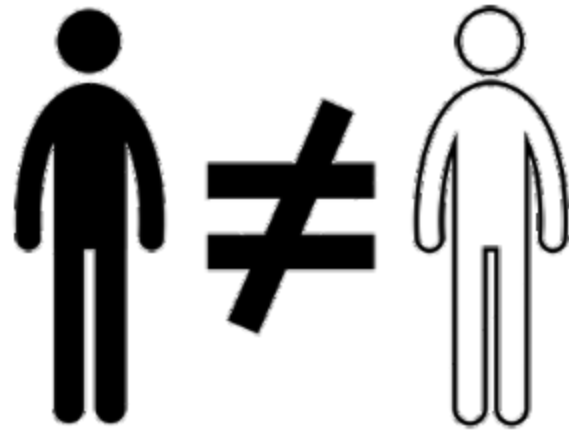
Created by corpus delicti
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About
achieving
equality.

Created by Marco Livolsi
from Noun Project

About
overcoming
barriers.
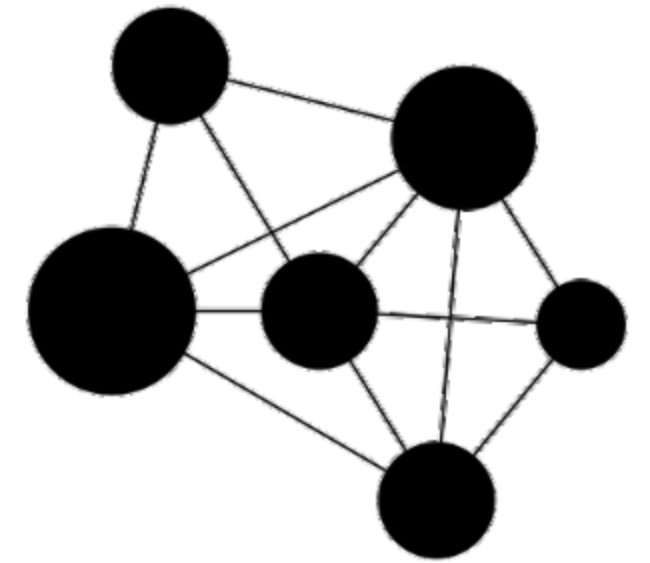
Created by Guilherme Furtado
from Noun Project

About helping
people navigate
existing systems.

Both targeted and universal interventions often fail to produce equitable outcomes.

Universal Approaches

- Universal approaches **treat everyone the same**.

- Examples:

  ➢ Universal school meals

  ➢ Universal health care

- Universal strategies don't distinguish between those most in need and can have the effect of **using scarce resources for the benefit of the privileged**.

- Universal strategies can **NEGLECT the extreme suffering** and harms that are uniquely experienced by some people

Targeted Approaches

- Targeted approaches **extend benefits or protections to a specific group**, and not to individuals outside of that group.

- Examples:

  o Enterprise Zones

  o Supplemental Nutrition Assistance Program (SNAP)

- Targeted approaches **fail to change systems**/structures and instead place the burden of change on people making change harder/less durable.

Targeted Universalism

- TU is an approach that **supports the needs of the particular(s) while reminding us that we are all part of the same social fabric**.

- TU is fixated on **systems/structures** and **outcomes** (impacts of structural/systemic changes).

- TU recognizes that **we are situated differently** and thus centers a structural/systemic analysis for defining the problem.

Targeted Universalism:
From People to Systems/Structural/Cultural Change

When you focus on individuals / groups	When you focus on structures/systems
• At an organization, **individual initiated solutions are subject to erasure or backslide** when individual leaves • Solutions that eliminate individual/ group disparities often **fail to address systems and structures** • Focusing on disparities **may create conflict** due to perceived preference	• Focusing on systems and structures can **create enduring change and transformation** • **Structural and systemic change impacts everyone**, and avoids preference while responding to greatest and most urgent needs

Targeted Universalism and Racial Equity

Targeted Universalism has been in support of and intertwined with racial equity from the beginning.

- TU was **designed to build on and advance racial equity**

- Provides **foundation, scaffolding, and guidance** for the work of racial equity.

- Offers **a more sustainable path** to racial equity outcomes than other equity frameworks that focus on eliminating disparities only.

- Is **designed for intersectionality** and provides a framework for aligning and integrating racial equity with other equity focus areas (e.g. disability, gender equity).

- Racial equity is **baked into stages 3, 4 and 5** of TU by design.

- **Advances racial equity while bridging** which further aids advancement of racial equity.

- **Supports defensibility** of racial equity work through a focus on situatedness data and outcomes.

Some municipalities are seeing success with the application of TU to racial equity.

SEED COLLABORATIVE

Targeted Universalism and Racial Equity

	Targeted Universalism	SPAREDI/Racial Equity	Relationship
Goal	Achieve universal goals/outcomes through systemic change while accounting for difference and situatedness.	Race can no longer be used to predict life outcomes and outcomes for all groups improve.	• TU is outcomes oriented and designed to yield the racial equity result Metro seeks.
Approach	• Analyzes structures, systems, culture that drive inequities. • Designs unique strategies for different groups based on analysis, to reach a shared goal.	• Acknowledges history of exclusionary and discriminatory policies. • Aims to eliminate barriers experienced by people of color and other groups.	• TU provides a design logic for advancing racial equity within multi-group contexts. • TU gives racial equity work a scalable, durable framework beyond individual programs. • TU atones for history and situatedness including histories of exclusion, discrimination and oppression of people of color while focusing on progress for all in the present and future.
Outcome	Equity across and at the intersection of different areas of focus — race, gender, class, ability, etc.	Improve outcomes for all groups – in particular across race, income, disabilities, sexual orientation, gender, age	Racial equity can be achieved alongside and at the intersection of other equity focus areas through use of the TU framework.

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

Questions and Discussion

Training on Organizational Culture

SEED COLLABORATIVE

Art Credit: Kim Nguyen for Fine Acts x OBI

Organizational Culture

- Opening Discussion

- Overview of Organizational Culture

- Relationship with Racial Equity & Governing Structures

- Q&A/Reflection

Art Credit: Jorge Losoya

So...
What is Organizational Culture?

What is Organizational Culture?

The unwritten rules, <u>norms, practices, behaviors</u>, dynamics, and ways of being and doing that shape the workplace and how people experience it.

- Behavior at scale

- How we know what is "good", "acceptable", and "normal"

- Shapes the effectiveness of strategy

- Involves shared meaning, purpose and understanding, its everywhere!

- Typical to have multiple cultures within a single department or organization

Why Does Organizational Culture Matter?

- Healthy organizational culture is associated with greater **productivity, employee retention, job satisfaction**, overall happiness, health, and engagement.

- Poor workplace culture can lead to **high turnover, low productivity, low job satisfaction**, and can drive employee complaint rates (especially venting and chronic complaints).

- **Healthy organizational cultures**:
    o center belonging and fairness
    o foster trust
    o provide psychological safety
    o offer opportunities for professional growth
    o flexible
    o offer opportunities to learn from mistakes
    o make employees feel valued and supported

Why Does Organizational Culture Matter for Racial Equity?

- Culture plays a critical role in **shaping the effectiveness of strategy** in general, and racial equity efforts in particular.

- Culture is the **soil that can either nourish or stifle racial equity**; it impacts *how* the work happens, *whether* it endures, and *how deeply* it drives transformation in systems and relationships.

- Culture can:

  - **Drive behavior beyond policy**. Informal cultural norms can determine whether racial equity principles are lived or performative.

  - **Reveal power and belonging.** Culture can influence who feels safe to speak, whose experience is valued, how information flows, how decisions are made, etc.

  - **Influence trust and sustainability.** Embedding equity values in culture supports credibility and allows racial equity work endure as people change.

  - **Drive outcomes and support organizational transformation.** Trainings and policies can shift knowledge, while culture shapes hearts, habits, behaviors, interactions, systems, and normalizes accountability.

The Four Levels of Organizational Culture

- **Individuals** (knowledge, skills, behaviors, capacity building, self-accountability)

- **Interactions** (group dynamics, hierarchy, co-creation, conflict resolution, bridging, accountability)

- **Institutions** (policies and practices, resource allocation, structures)

- **Ideas** (communications, tone at the top, challenging assumptions and bias)

HAMEDANI, MARKUS, HETEY, AND EBERHARDT

Figure 1
The Culture Cycle: Mapping Culture's Key Parts

Ideas
Status quo assumptions about what and who is good, moral, powerful, effective, and why

Institutions
Institutions, organizations (e.g., governments, schools, prisons, media) and their laws, policies, and practices

Interactions
With people, (e.g., family, police), groups (e.g., teams, congregations), and products (e.g., social media, ads)

Individuals
People's psychology and actions (e.g., thoughts, feelings, identities, mindsets, biases, and behaviors)

Governing Structures <> Organizational Culture

- Governing and advisory structures (e.g., boards, councils, steering committees, advisory groups) and organizational culture have a **reciprocal and dynamic relationship**.

- **Structures create culture → Culture sustains or reshapes structures.**

- Racial equity requires transforming *both simultaneously* — **not just who's in the room, but how the room itself operates**.

Governing and advisory structures shape culture by -	Culture influences governing and advisory structures by –
❖ Setting tone for norms and behaviours ❖ Controlling access to resources and agenda setting ❖ Formalizing (or neglecting) equity commitments ❖ Determining whose values and voices define success	❖ Affecting who is invited to the table, whose voice is heard, who stays. ❖ Shaping decision-making norms ❖ Legitimizes (or undermines) advisory voices ❖ Determining adaptability and learning through feedback, reflection, evolution

Clarifying Questions

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

SEED COLLABORATIVE

Art Credit: Camila Leão for Fine Acts x OBI

Introduction & Methodology

Art Credit: Teo Georgiev for Fine Acts x OBI

Reminder: Four Stakeholder Groups

- Committee on Racial Equity (CORE)

- Metro Council (Council)

- Racial Equity Leaders Table (RELT)

- Senior Leadership Team (SLT)

SEED COLLABORATIVE

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.

- **36 additional Documents** on department racial equity achievements reviewed internally by DEI team

- **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

WE ALL BELONG

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.

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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. Convene and support regional partners to advance racial equity
B. Meaningfully engage communities of color
C. Hire, train, and promote a racially diverse workforce
D. Create safe and welcoming services, programs, and destinations
E. Metro's resource allocation advances racial equity

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Metro's 6 Approach to Racial Equity

Leading with Race

Focusing on eliminating the disparities that people of color experience in all aspects of social well-being, especially in those related to Metro's policies, programs, services and destinations.

Targeted Universalism

Addressing the disparities that affect the most disadvantaged will generate solutions to address most of the needs of other vulnerable groups.

Building Infrastructure

Creating the frame and space for Metro councilors, directors, staff and other stakeholders to advance the conversation about race, enact changes at the institutional level and organize for structural change.

Generating Support

Working with internal stakeholders and regional partners to promote an equity approach that creates institutional and structural change.

Partnering with communities of color

Ensuring that members of these communities are involved in Metro's equity efforts to create greater trust and accountability.

Measuring Progress

Measuring and recognizing milestones and significant developments, to increase and maintain momentum along the route to greater racial equity and change.

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 with significant investment in community engagement

- ❖ **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 Strengths (contd.)

Strengths

- ❖ **Leading with Race:** Departments and Venues are centering race explicitly in equity work, recognizing racial disparities are systemic and require targeted strategies.

- ❖ **Community Engagement:** Departments and Venues emphasize meaningful engagement with communities of color including: co-creation of policies and programs, compensation for participation and prioritizing lived experience in decision making.

- ❖ **Inclusive Workforce and Contracting:** Departments and Venues have strong focus on hiring, retaining and promoting staff, and goals for workforce diversity.

- ❖ **Accountability and Measurement:** Departments and Venues commit to tracking outcomes, disaggregating data and reporting.

- ❖ **Safe and Welcoming Spaces:** Departments and Venues work to ensure inclusive and accessible spaces.

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

SEED COLLABORATIVE

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):

❖ <u>Council</u> - Some Participants shared that sometimes staff treats Council like a checklist, and that Council sometimes doesn't have the opportunity for debate or to be included as thought partners due to process timelines.

❖ <u>DEI Department</u> - 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.

❖ <u>CORE</u> - 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 be contradictory.
- ❖ 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

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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

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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
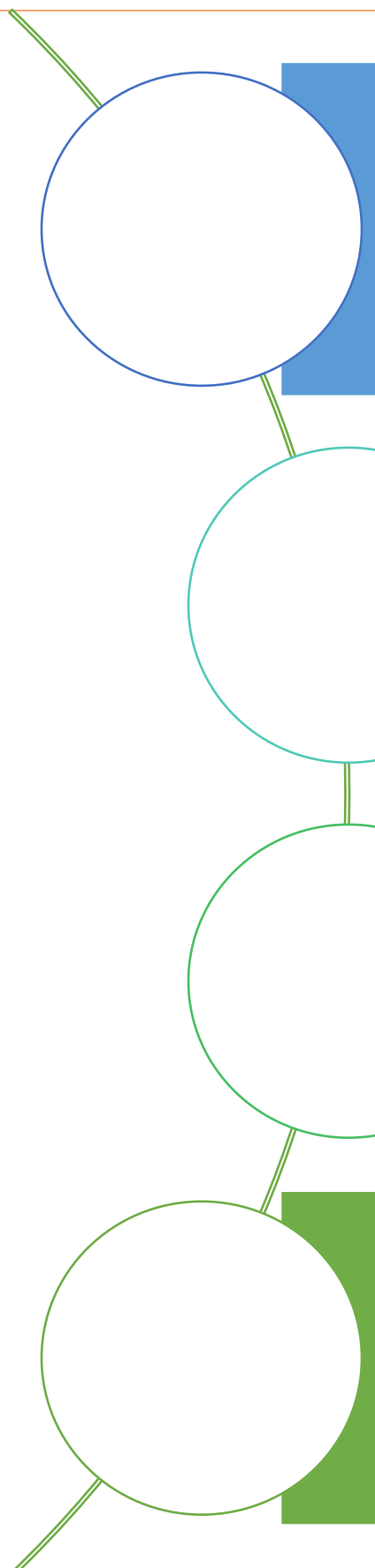
❖ Establish a poverty to prosperity initiative

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

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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:

➢ Respond and be antidotes 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.

Individual Reflection & Group Discussion

1. What resonated with you and why?

2. What surprised you and why? What made you curious?

3. How did the Assessment impact your thinking about Metro's organizational culture and approaches to racial equity?

    a. Did it change your understanding?

    b. Did it spark reflections or ideas? If so, what?

4. What do you think the Assessment means for Council's work ahead?

SEED COLLABORATIVE

TIME FOR AN ENERGIZER!

Stand-Up Stretch/Dance/Movement Wave

Instructions:

Stand together in a circle.

Evan kicks it off with a stretch, dance move, or simple movement.

Everyone copies Evan's movement in a clockwise order.

The next person creates their own movement for the group to copy.

Continue around the circle until everyone has shared a movement.

World Café Instructions

Purpose: To generate actionable recommendations on the three Council Objectives.

Step 1: Three tables set up with 3 objectives. Council members distribute themselves across tables and co-create recommendations + implementation guidance for that objective.

Step 2: Listen for the facilitator's cue to rotate to the next table. Review and previous group's work and modify or add to the recommendations.

Step 3: Rotate 2 more times. Repeat the instructions from Step 2 in each rotation.

Step 4: Return to large group for debrief, gallery walk, and consensus alignment.

Reflection Questions – Council's role

1. **How does Council currently apply its decision-making role to advance racial equity and enforce accountability to the SPAREDI?**

   a. What is working well? What needs to stay the same?

   b. What needs to change/improvement to ensure Council supports racial equity at Metro?

2. **What effective, concise, and actionable information should be provided to Council to support clear consistent leadership amidst constraints?**

3. **What are effective ways in which Council should receive and consider advice from CORE?**

Gallery Walk

Council's Role - Gallery Walk

Purpose: Reflect on and respond to the recommendations created by your colleagues.

Step 1: Walk around the room and review each group's recommendation posted on the wall.

Step 2: React by adding a sticky note or check mark to share:
- What you agree with or find compelling
- Any questions, concerns, or suggestions

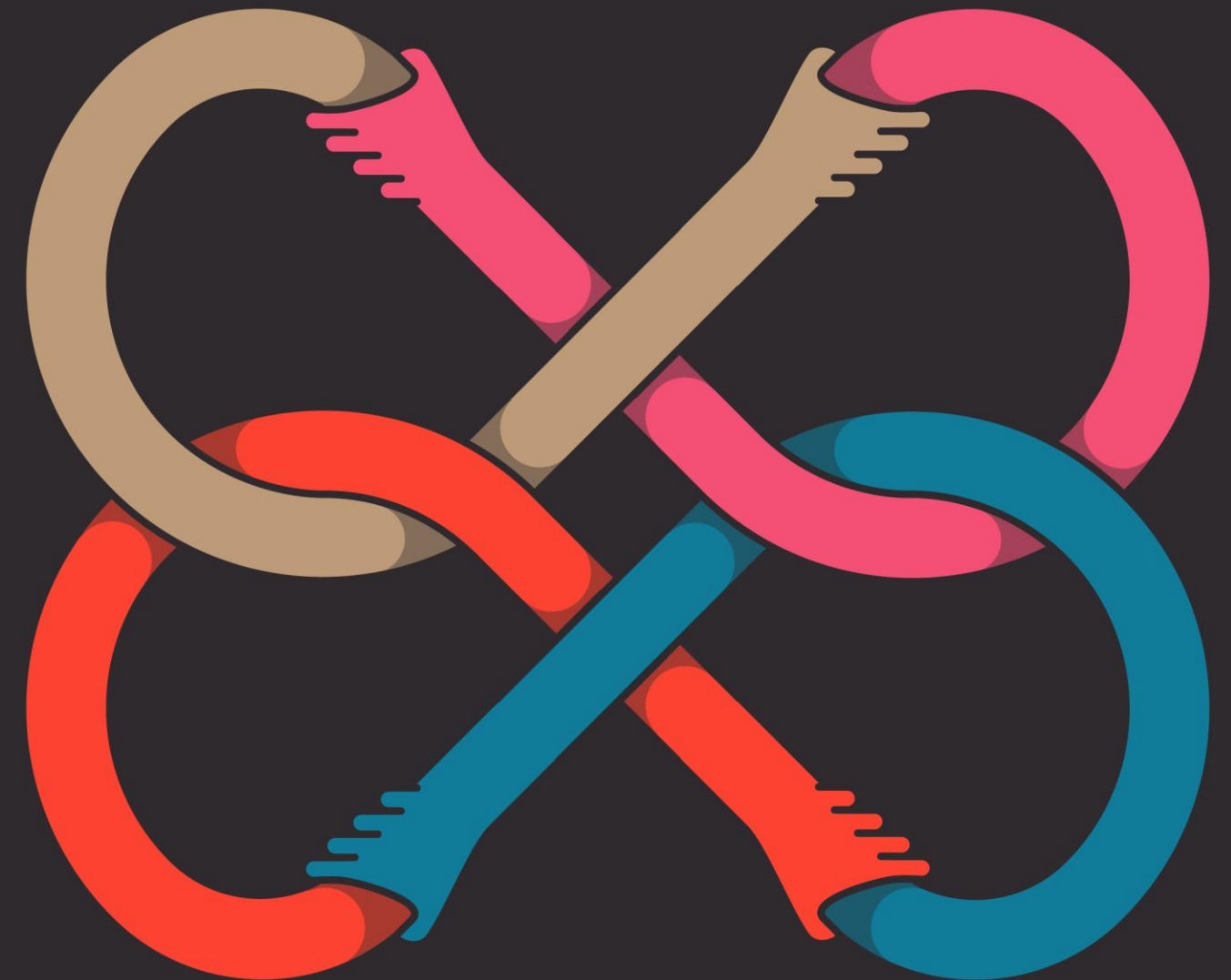**Step 3:** When finished, return to your seat — these recommendations and reactions will be revisited for final decision-making on Day 2.

Next Steps & Adjourn

- Thank You!

- Preview of Day 2

- Housekeeping Items

Art Credit: In-House Int'l Creative

Thank You!

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Targeted Universalism Learning and Alignment Project Overview

Metro is on a journey to explore how Targeted Universalism could support the advancement of its racial equity strategies and other agency efforts. The project aims to build shared understanding and alignment for the update of the Strategic Plan.

Background

The Strategic Plan to Advance Racial Equity, Diversity and Inclusion (Strategic Plan), adopted in 2016, codified Metro's commitment to advancing racial equity through a bold and ambitious vision.

As part of the Strategic Plan's evaluation, the Impact Report, completed in 2024, suggests that future iterations can begin to define specific outcomes and metrics. One potential approach identified is Targeted Universalism (TU) - an approach designed to drive systemic change through tailored strategies that achieve shared goals.

To explore this further, Metro is partnering with Seed Collaborative, co-founded by professor john a. powell. TU could serve as a unifying approach to the next version of the Strategic Plan, but more meaningful work is needed to assess its fit for Metro.

Where are we now?

The TU Learning and Alignment Project is designed to foster shared understanding across key groups about what racial equity means – both in practice and in outcomes – and to support Metro in determining whether TU is the right approach to adopt for the next version of the Strategic Plan. As an initial step, the project will begin with an assessment to ground the project, evaluate current understanding of TU and identify the elements needed to build consensus. This process will include one-on-one interviews, focus groups with a sub-set of stakeholders and an analysis of relevant organizational documents.

The Assessment results will be used by Seed and the Project Advisory team (see below) to craft four two-day retreats sessions in the fall and winter for decision-makers and stakeholder groups. The retreats will aim to develop a shared understanding of TU across these four groups:

- Metro Council
- Senior Leadership Team
- Metro's Committee on Racial Equity (CORE)
- Racial Equity Leaders Team – *this group includes all DEI Department staff, Equity Leaders, and ERG Co-Chairs and staff from across Metro.*

A <u>Project Advisory Team</u> representing staff or community from each of these groups is helping to inform and guide the process, including co-designing the retreats, with the support of Seed Collaborative. This team will kick off in early September. Members of the Project Advisory Team are:

- Sebrina Owens-Wilson, DEI
- Cassie Salinas, DEI
- CeCe Ridder, DEI
- Katie Hentges, Communications
- Holly Calhoun, COO's office
- Tabitha Miles-Kingrey, Parks & Nature

- Temmecha Turner, CORE
- Marta McGuire, WPES
- Craig Stroud, Venues
- Kristin Dennis, Council Office
- Tracey Lam, PD&R
- Charetta Long, Oregon Zoo

Finally, in the Spring, a fifth two-day session combining all four key decision maker groups will acknowledge areas of agreement and grapple with areas of divergence to bring about alignment related to the application of TU at Metro.

What is Targeted Universalism?

Targeted Universalism (TU) offers a strategic advantage by establishing universal goals pursued through targeted interventions that address systemic, structural, and cultural barriers faced by particular populations. It recognizes that individuals are differently situated due to systemic factors like racism, geography, and policy — and uses data-driven tools to identify gaps for each group and design unique pathways to reach the universal goal, thus promoting equity and belonging for all groups served.

This initiative is an opportunity to co-develop a shared equity vision, align strategic priorities, and ensure Metro's policies and programs reflect a commitment to racial equity. The outcome will be a consensus on how TU can be applied to Metro's racial equity efforts and broader organizational goals.

Some resources to continue to explore TU from the <u>Othering and Belonging Institute,</u> include videos, a primer, a fact sheet and even a course.

Additional Resources

<u>Strategic Plan to Advance Racial Equity, Diversity and Inclusion</u>
<u>Impact report: 2016 Strategic Plan to Advance Racial Equity</u>
<u>Targeted Universalism</u>

Targeted Universalism Learning & Alignment Project

Metro is exploring how Targeted Universalism could support the advancement of its racial equity strategies and other agency efforts. The project aims to build shared understanding and alignment for the update of the Strategic Plan.

2016 – 2024
Strategic Plan & Impact Report
Metro adopts the Strategic Plan to Advance Racial Equity, Diversity and Inclusion; the 2024 Impact Report suggests stronger alignment in goals, approach and accountability.

Fall 2025
TU Project Launch & Assessment
Metro partners with Seed Collaborative to begin the TU Learning & Alignment Project. Assessment phase includes interviews, focus groups, and document analysis to shape alignment retreats.

Fall – Winter 2025
Learning & Alignment Retreats
Key decision-makers and interested groups (Metro Council, Community on Racial Equity, Senior Leadership Team and Racial Equity Leaders) convene to building shared understanding and assessment of TU.

2025 – 2026
Consensus Building & Alignment
All groups meet to acknowledge agreement, address divergence on applying TU to the update of the Strategic Plan and other efforts at Metro.

Metro

Memorandum

To: Sebrina Owens-Wilson, Department of Diversity, Equity, and Inclusion, Oregon Metro

From: Evan Holland, Paul Hudson, and Ratna Sinroja, Seed Collaborative, LLC

Date: October 1, 2025

Subject: Racial Equity Assessment

The purpose of this memorandum (memo) is to share analysis yielded from the Racial Equity Assessment (Assessment) of Oregon Metro (Metro) conducted by Seed Collaborative (Seed). This memo is intended to provide a base of information for the Targeted Universalism[1] (TU) Learning and Alignment Project, specifically informing the focus and topics of upcoming retreats of Metro stakeholders to decide its future approach to racial equity and whether TU should be included in that approach. This memo is intended for an internal Metro audience and is specifically for use by the Metro Diversity, Equity, and Inclusion (DEI) Department as well as the TU Learning and Alignment Project Advisory Team. This memo is divided into four sections: Introduction, Summary of Analysis, Methodology, and Analysis of Assessment Findings.

Introduction

To align and prepare stakeholders for upcoming strategy planning, Metro's DEI Department retained Seed to facilitate a series of learning and consensus-building sessions where four stakeholder groups will decide Metro's future approach to racial equity and whether TU should be applied to that future approach.

The four participating stakeholder groups are:

- **Metro Council (Council)** – The Council is responsible for setting policy and stewarding the work of Metro in service of its constituents. This group is comprised of a President and six Councilors who are elected by district every four years.

- **Senior Leadership Team (SLT)** – The 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; the Metro Attorney; and senior leadership from all departments.

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[1] Targeted Universalism or TU is a strategic equity framework whereby universal goals meant to improve conditions for all are pursued through targeted strategies that consider the situatedness of different groups and seeks systemic, structural, and cultural change to smooth each group's path to the universal goal.

- **Committee on Racial Equity (CORE) –** CORE is a group of diverse community advocates who advise Metro Council and staff on strategies to advance racial equity across the region.

- **Racial Equity Leadership Table (RELT) –** RELT align, coordinate, and implement Metro's commitment to equity across the agency, including supporting each other as a community of practice, onboarding new equity leaders, supporting the DEI Department's efforts to collect and analyze data, and normalizing conversations about race, racism and equity. This group includes DEI Department staff, Equity Leaders from each department, and Employee Resource Group (ERG) Co-Chairs.

As a first step in the TU Learning and Alignment Project, Seed conducted an Assessment using three data sets – interviews, focus groups, and a document and artifact review— to understand opinions, perceptions, and ideas across the four stakeholder groups about the advancement of racial equity at Metro, as well as familiarity and potential alignment with TU. The findings of this Assessment are summarized below and presented in more detail in the following sections of this memo.

Insights from the Assessment will be used to co-develop four retreats (one for each of the stakeholder group), focused on learning about TU and considering its application to racial equity at Metro. These retreats will be followed by a fifth and final retreat session combining all four stakeholder groups with the intention of acknowledging agreement, addressing divergence, and deciding on Metro's future approach to racial equity and whether TU will be a part of that future approach in preparation for upcoming DEI strategic planning.

Summary of Analysis

Metro has established a significant history of almost a decade of investment and commitment to racial equity, which has resulted in lauded achievements such as historic investments in affordable housing and parks as well as workforce and vendor diversity. These achievements were supported by the strength of Metro's racial equity strategy and approaches including the fact that Metro's leadership are largely supportive of racial equity.

Despite these accomplishments and organizational strengths, the advancement of racial equity at Metro seems hindered by aspects of Metro's organizational culture and leadership. Aspects of Metro's organizational culture that may serve as barriers to the advancement of racial equity include:

- A process oriented "stuckness" dynamic that can stall progress and disrupt momentum.
- Perfectionism and performance that may be causing burnout and overwork as well as stifling engagement.
- Poor communication loops and struggles with transparency that impact the perception and coordination of racial equity work.

Aspects of Metro's leadership, and issues of role, clarity, and accountability present a challenge to the advancement of racial equity at Metro, including:

- Some employees feeling unsupported or disempowered to advance racial equity work creating a dynamic of "blurry leadership", potentially stocking uncertainty and ambivalence.
- Unclear roles, purviews, and lines of authority related to racial equity that create challenges for accountability.

Seed also found a variety of process and outcomes improvement areas related to racial equity at Metro, including:

- A narrow focus within racial equity initiatives that some feel needs to be rightsized.
- Challenges with clarity and alignment of racial equity work across the agency.

Seed finds that progress on racial equity necessitates leveraging organizational strengths to ameliorate barriers and challenges, and shifting focus from process to measurable, tangible outcomes, supported by clear and specific scopes, roles, and lines of authority. Seed encouraged Metro to consider adoption of TU as a framework applied to its racial equity approach as the framework applied to fidelity can support this shift in focus and enhance future impact.

Methodology

To produce the analysis summarized above, Seed conducted an assessment of Metro's racial equity strategy and approaches as well as stakeholder TU familiarity and acumen. Seed began by collaborating with team members of the DEI Department to establish the following research questions to guide the Assessment process:

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 till 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?

Seed went about addressing the research questions by starting with a review of 20 organizational documents as well as several web-based artifacts including the DEI Department overview, values, training information, the SPAREDI, the 2023 Employee Survey, strategic leadership framework, and the 2024 Impact Report, among others. Post Seed completing its analysis, an additional 36 documents pertaining to department level racial equity achievements were reviewed internally by a DEI team member and insights were added to the strengths and achievements section.

Seed then conducted eight one-on-one interviews and three focus groups. While interviews were conducted with members from across all four stakeholder groups, Seed was unable to conduct a focus group with CORE members. The interviews and focus groups were conducted based on a phenomenological approach that focuses on the everyday lived experiences of Interviews and Focus Group Participants (Participants). Based on the research questions and document review, Seed developed a custom guide for facilitation of interviews and focus group conversations. Not every Participant was asked every question as conversations were allowed to unfold iteratively. Seed conducted two rounds of coding on the transcripts of all conversations. The first round coded for key themes based on the research questions, while the second round further analyzed and categorized codes into higher order themes and insights. These themes and insights are outlined in the section below.

To preserve confidentiality, only themes uplifted by two or more participants have been included in the memo and no names or quotes are included. An exception to this rule was made for Metro's Tribal Affairs Liaison, who explicitly requested that their opinions be included in Seed's reporting of Assessment analysis even if they were the only one that shared them. In the Assessment findings below, Interview and Focus Group Participants will be referred to as "Participants".

Analysis of Assessment Findings

Metro's years of investment in racial equity have generated goodwill and a variety of achievements. Beginning with the adoption of the 2016 Strategic Plan to Advance Racial Equity, Diversity and Inclusion (SPAREDI), Metro's strategic commitment to racial equity has led to historic investments in the areas of housing, workforce and vendor diversity, and community partnerships. This commitment continues with Participants across the four stakeholder groups expressing their commitment to the continued advancement of racial equity and diversity, equity, and inclusion generally at Metro.

Despite these accomplishments, the progression of racial equity at Metro is hindered by aspects of the organizational culture including being prone to "stuckness" and conflict-avoidance, alongside challenges relating to "blurry leadership", a lack of clear roles and accountability, and poor communication flows. For Participants, future progress towards racial equity requires leveraging organizational strengths to ameliorate challenges and barriers, shifting focus from process to measurable, tangible outcomes, and specifying scopes, roles, and lines of authority.

Based on Participant feedback, Metro will need to consider whether to renew their commitment to TU as a framework to advance racial equity and what that means for its approach going forward.

The following Assessment analysis is organized into four sections covering Metro's approach to racial equity, the strengths and challenges with that approach, and ideas that can shape the future of Metro's racial equity practice.

Metro's Approach to Racial Equity

Metro's focus on and approach to racial equity was codified in the 2016 Strategic Plan to Advance Racial Equity, Diversity and Inclusion (SPAREDI or The Plan), laying out an agency and community facing vision and strategy for racial equity. SPAREDI notes, "Metro has identified racial equity as the approach to ensure that all people who live, work and recreate in the Portland region have the opportunity to share in and help define a thriving, livable and prosperous region." It goes on to explain that "[b]y addressing the barriers experienced by people of color, we will effectively also identify solutions and remove barriers for other disadvantaged groups." The Plan has been foundational for Metro, guiding the work of the Diversity, Equity, and Inclusion (DEI) Department, as well as shaping the work of two stakeholder groups: the Racial Equity Leadership Team (RELT) and the Committee on Racial Equity (CORE).

The Plan defines racial equity as *"Race can no longer be used to predict life outcomes and outcomes for all groups are improved."* This aligns with the way Participants from three of the four stakeholder groups (SLT, Council, and RELT)[2] defined racial equity, marking general agreement among internal agency stakeholder groups about the definition of racial equity at Metro.

The Plan outlines a set of five overarching goals:

- Goal A: Convening and supporting regional partners to advance racial equity
- Goal B: Meaningfully engaging communities of color
- Goal C: Hiring, training and promoting a racially diverse workforce
- Goal D: Creating safe and welcoming services, programs, and destinations
- Goal E: Equitable allocation of Metro resources

The Plan also outlines the intended approach to achieving these racial equity goals[3]:

- **Leading with race**: Focusing on eliminating the disparities that people of color experience in all aspects of social well-being, especially in those related to Metro's policies, programs, services, and destinations.

- **Targeted Universalism**: Addressing the disparities that affect the most disadvantaged will generate solutions to address most of the needs of other vulnerable groups.

- **Building infrastructure**: Creating the frame and space for Metro councilors, directors, staff and other stakeholders to advance the conversation about race, enact changes at the institutional level and organize for structural change.

- **Generating support**: Working with internal stakeholders and regional partners to promote an equity approach that creates institutional and structural change.

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[2] CORE Participants stated that the group has not defined racial equity.
[3] Language quoted directly from the SPAREDI.

- **Partnering with communities of color**: Ensuring that members of these communities are involved in Metro's equity efforts to create greater trust and accountability.
- **Measuring progress**: Measuring and recognizing milestones and significant developments, to increase and maintain momentum along the route to greater racial equity and change.

Since the publishing of SPAREDI, a variety of agency and community stakeholders have collaborated to implement strategies and achieve goals and objectives outlined in the Plan. The resulting achievements from these efforts highlight a variety of strengths that support Metro's racial equity advancement.

On the other hand, findings outlined in the Impact Report[4] as well as themes from interviews and focus groups also point to a variety of barriers to Metro's advancement of racial equity, along with opportunities for improvement. Seed assesses that Metro's continued progress on racial equity will need to be driven by strategies that leverage strengths, ameliorate barriers, and meet the current political moment.

Strengths and Achievements of Racial Equity

Over the nine years of SPAREDI implementation, Metro's racial equity achievements have been lauded as Participants shared stories of the impact the Plan has had on regional and national officials and agencies. From historic investments in parks and affordable and supportive housing fueled by bond and serve measures to increased employee diversity and enhanced employee and community engagement and capacity building, Metro's achievements have elevated the agency as racial equity a leader in the region[5].

Participants shared stories about how other public agencies and officials see Metro's racial equity work as visionary, with the existence of the SPAREDI noted as a distinguishing asset (3).

In addition to this recognition, Participants noted the following racial equity achievements:

- **Partnership:** Metro has increased and strengthened partnerships with community organizations and is trying to share decision making and be more responsive to community stakeholders (3). Per the DEI team's internal review of department achievements, significant investments have been made towards community engagement.
- **Diversity:** Workforce and vendor diversity has increased, with more staff now at Metro who are representative of the communities Metro serves (3).
- **Employee Retention:** Metro's equity work contributes to staff retention, while its Employee Resource Groups (ERGs) in particular supports retention of employees of color (3).

Participants also note a variety of strengths that support Metro's advancement of racial equity:

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[4] Impact Report: 2016 Strategic Plan to Advance Racial Equity
[5] Ibid

- **Service and Innovation:** Metro staff are passionate about their work in terms of public service and technical expertise (4), and Metro's culture offers staff opportunities to explore creativity and innovation in the work (3).

- **DEI Investment:** Participants appreciate Metro's investment in the agency's DEI capacity including resourcing a standalone DEI department with staff, a budget, and programming (3). This is backed by results from the 2023 Employee Survey in which 20% of respondents note "Specific Approval of Metro DEI Policy or Staff Member" as Metro's greatest accomplishment in reaching goals related to DEI.

- **DEI Team:** Participants stated that the DEI Department has been influential (3) through employee communications, building supportive narratives, and fostering conversation and buy-in for racial equity over the last decade (2) with the DEI Team playing multiple roles, acting as strategists, coaches, advisors, and trainers.

- **DEI Buy-in:** Participants noted a key strength in that the Metro Council and Senior Leadership at Metro are all supportive of equity work (3) a dynamic Seed had the opportunity to witness during interviews and focus groups. This notion is supported by 27.5% of employees who responded to the 2023 Employee Survey identifying "Strategy and Commitment" as Metro's greatest accomplishment in reaching goals related to DEI.

In addition, the following strengths were highlighted through the DEI team's review of department level documents:

- **Leading with Race:** Departments and Venues are centering race explicitly in equity work, recognizing racial disparities are systemic and require targeted strategies.

- **Community Engagement:** Departments and Venues emphasize meaningful engagement with communities of color including: co-creation of policies and programs, compensation for participation and prioritizing lived experience in decision making.

- **Inclusive Workforce and Contracting:** Departments and Venues have strong focus on hiring, retaining and promoting staff, and goals for workforce diversity.

- **Accountability and Measurement:** Departments and Venues commit to tracking outcomes, disaggregating data and reporting.

- **Safe and Welcoming Spaces:** Departments and Venues work to ensure inclusive and accessible spaces.

Seed believes that Metro can use the momentum of its accomplishments and leverage its strengths to support the continued advancement of racial equity at Metro. Seed sees stakeholders' buy-in as a fulcrum critical to the sustainability and maturity of racial equity at Metro. This fulcrum can serve as the base upon which the levers of DEI investment and spirit of service and innovation can rest and be used to propel Metro's racial equity initiatives towards even greater outcomes.

Barriers, Challenges, and Areas of Improvement

Analysis of findings point to a variety of challenges that impact the operationalization of racial equity at Metro. Elements of Metro's organizational culture function as barriers to the smooth advancement of racial equity. Challenges related to leadership, accountability, and role clarity may hinder racial equity progress. Seed has also uplifted process and outcomes improvements that can be addressed in future racial equity strategy development. These barriers, challenges, and areas of improvement are outlined below.

Organizational Culture

Organizational culture is made up of the norms, values, behaviors, ideas, practices and ways of being and doing that shape the operating environment of any institution. "Organizational culture coordinates people's identities and interactions within institutions, organizations, and groups through policies, practices, and norms, serving as an existential rubric"[6]. Culture has a direct impact on the ability of any organization to implement strategy; as the saying goes, *culture eats strategy for breakfast*. Overall, Participants stated that there is no one Metro culture but many different cultures which vary by department, location, and even manager (9). This is a normal dynamic in public agencies. Despite this finding, "fixing company culture" was one of the actions noted in the 2023 Employee Survey that Metro needs to take to better address DEI moving forward. Respondents also chose "improve work culture" as their first-choice suggestion to increase employee engagement. Participants uplifted a variety of challenges in Metro's culture that could serve as barriers to the advancement of racial equity:

- **Stuck in Process**: Participants from SLT, RELT, and Council described Metro culture in general and the operationalization of racial equity in particular as being process oriented (as opposed outcomes oriented) and that there can be a lack of implementation and accountability (10). This is exacerbated by what Participants describe as "Pacific Northwest niceness" and passive aggressiveness (3) as well as Metro's struggles with change, adaptability, moving from planning to doing, and making tough decisions (5). Additionally, Participants described Metro as conflict averse and avoidant (5), bureaucratic (3), and sometimes having an assumed need for consensus.

  Whether or not these dynamics are intended, the result is an experience of "stuckness" causing frustration for some Participants. Some Participants from Council, SLT, and RELT shared that middle management impacts progress of racial equity work through risk aversion and stuckness around implementation (4). For example, a couple of Participants lamented the potential burden or harm due to misalignment with community priorities (2) including stories about uncaptured opportunities to meet community requests in favor or less transformative, process-oriented projects. In this way, stuckness can disrupt

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[6] Hamedani, MarYam G., Hazel Rose Markus, Rebecca C. Hetey, and Jennifer L. Eberhardt. "We Built This Culture (so We Can Change It): Seven Principles for Intentional Culture Change." *American Psychologist* 79, no. 3 (April 2024): 384–402. https://doi.org/10.1037/amp0001209.

momentum, cause disillusionment, and stall progress acting as an added weight on racial equity initiatives.

- **Perfectionism and Performativity:** SLT and RELT Participants reported a prevalence of perfectionism and fear of failure in Metro's culture, driving overperformance and burnout (7). A possible consequence is what Participants described as a culture of fear, a "word cop" culture where DEI knowledge is weaponized, and the fear of being "canceled" makes critique and learning difficult and acts as a barrier to strategic reflection on racial equity, causing concern that discussing areas of improvement could be taken as anti-racial equity (7). Another consequence is Participants described some racial equity efforts as being performative and lacking depth or meaningful action (2) a dynamic that may in part fuel the experience of "stuckness".

  Perfectionism and performativity can stifle honest strategic planning for the future of racial equity as well as cause othering for some in the process. They can stall momentum and cause buy-in to wear thin, all while distracting from opportunities for beneficial impact.

- **Communication and Transparency:** Participants from SLT, Council and RELT lamented poor communication flows (11) including internal data hoarding, siloing, and data being withheld or curated to fit a narrative. This is backed by data in the 2023 Employee Survey in which 18% of comments from Black/African American, Asian/Asian American, Native American/American Indian/Alaska Native, and Multiracial employees reflected a lack of awareness about Metro's DEI related accomplishments. "More communication" as a suggestion to increase employee engagement was also uplifted in the Survey.

  Racial equity initiatives thrive when data and information is transparent and when communications are clear and crosscutting. Poor information flows and data transparency challenges can possibly be connected to a trust deficit in the culture, or the perfectionism and fear of failing dynamic outlined above. They stifle engagement and collaboration and make it difficult to track progress on racial equity initiatives.

- **Fatigue**: RELT and SLT Participants expressed feeling "framework fatigue", and frustration that racial equity plans and tools are incomplete, ineffective, inconsistent, or not being utilized (9). This fatigue can contribute to the feeling of burnout discussed above.

Leadership, Roles and Accountability

In addition to the cultural barriers outlined above, Metro's racial equity advancement is challenged by issues regarding clarity of roles, leadership, and accountability. "Leadership and follow-through" was listed as the greatest challenge to achieving DEI goals in the 2023 Employee Survey. "Need stronger/ better leadership" was uplifted in the Survey as a suggestion for increasing employee engagement.

- **Leadership and Support**: Some RELT Participants reported not feeling support from leadership for racial equity work (3) and that RELT staff feel disempowered from doing their assigned jobs (2). Some Participants from SLT and RELT expressed frustration that power is tied to people, not roles (2). When employees don't feel supported and empowered to

engage in DEI work by those in positions of formal or informal authority, the "tone at the top" regarding the prioritization of DEI is unclear, which can stoke uncertainty and ambivalence. Rather than clear and decisive leadership that clarifies and energizes, "blurry leadership" can lead to slow momentum and limit the range, depth, and impact of DEI initiatives.

- **Role and Authority**: When Seed asked Participants who "owns" racial equity, some said Metro's Chief Operating Officer and Council (2). Participants saw a role for Council and SLT to send a clear message on prioritizing outcomes (2) in racial equity work. Participants noted a lack of role clarity between Council and staff, including Council exerting more influence on projects and that there is not enough separation or protection between staff and Council (3). On the other hand, 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.

  Some Participants also reported a lack of clarity on the DEI Department's role and authority (4) and that the DEI Department plays a variety of roles (as outlined above), but they don't have the authority to enforce accountability for implementing equity strategies (2).

  Regarding the role and authority of the Committee on Racial Equity (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 (2). Having said this, Participants noted that there have been improvements in opportunities to contribute since CORE gave feedback to staff on the matter (2).

Racial equity initiatives thrive when they are championed and prioritized by those with power and influence in an organization, and when roles and intended outcomes are clear. Blurry leadership is a less nourishing environment for racial equity initiatives and can be draining, ultimately impacting progress. Blurry leadership also compounds the cultural dynamics outlined above, thus contributing to a feeling of stuckness, overwork, and fatigue. This blurry leadership dynamic might also contribute to or be evidenced by the concerns about poor communication flows outlined above.

Taken together, these factors can limit impact and erode trust which is vital to easeful advancement of racial equity. Clarity in terms of roles, authority, and accountability related to racial equity are critical to the progress and maturity of racial equity at Metro. Empowered teams with clear mandates help employees to exercise leadership regardless of position. A clearly supportive "tone-at-the-top" for racial equity initiatives is vital to helping all at Metro understand that racial equity is a priority and to push implementation to generate the desired results.

Process and Outcome Improvements

In the course of this Assessment, Seed was made aware of a variety of improvement areas for the processes and the outcomes that advancing racial equity at Metro. 10% of comments from Black/African American, Asian/Asian American, Native American/American Indian/Alaska Native, and Multiracial employees in the 2023 Employee Survey indicated general pessimism about Metro's DEI efforts. "Better implementation of DEI work" was listed as a suggestion to increase employee engagement at Metro in the 2023 Employee Survey. In addition, Seed highlights the following areas of improvement that were uplifted by Participants:

- **Narrow Focus**: SLT, Council and RELT reported that some DEI programming at Metro is too narrow (4). This was expressed by SLT and Council Participants as a tension between the public agency nature of Metro and a "nonprofit culture" (3), 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 (2) while some RELT Participants highlighted a need to develop and strengthen tools to be responsive to intersectionality (2).

- **Clarity and Alignment**: CORE and SLT Participants described a lack of common baseline across the agency as each department has its own goals and plans that can sometimes contradict each other (5). In particular, the Tribal Affairs Program liaison described the lack of an annual list of programs across the agency as a barrier to inclusion and co-creation with Tribes. SLT and RELT Participants stated the need to develop an agency-wide framework to improve consistency in goal setting and effective implementation across different departments (4). In addition, Seed sees an opportunity for Metro to specify and clarify the intended outcomes of racial equity strategies to contribute to a common baseline and build understanding, and alignment across stakeholder groups. In line with this need for clarity, the 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.

Exacerbating both areas of improvement is the current national political environment and pressures from the federal government. "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. In reaction to a question about the impact of federal government's actions on Metro's racial equity initiatives, some SLT and Council Participants noted having to navigate a tricky balance between compliance versus risk (4) given Metro receives federal funding, which could be impacted by Trump Administration actions (2). At the same time, 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 (3). Further, several SLT Participants linked the federal government backlash (4) to the othering caused by the general operationalization of racial equity in a narrow way. These external factors place higher stakes on issues of narrowness, clarity and alignment.

Future Vision for Racial Equity

Seed asked Participants to describe their vision for the future of racial equity at Metro, and a variety of ideas were shared that can help address the barriers and challenges outlined above.

1) **Outcomes Oriented**: Participants expressed a desire to focus on outcomes and ensure that data and evaluation help Metro assess the impact of racial equity initiatives and drive outcomes for communities across the region (10).

2) **Collective Ownership**: Participants want to see all staff own racial equity at Metro so that it is embedded into the agency's everyday work, with clear roles and contributions (9).

3) **Clarify Scopes and Roles**: Participants want defined criteria as well as scopes of work for each department, and an understanding of how diverse roles contribute to advancing racial equity (5) including bifurcation of internal and external equity work, more focus on the community (3) and establishing poverty to prosperity initiatives for the community (2).

4) **Shared Leadership**: Participants want to see more outspoken leadership on racial equity, more support of risk taking for racial equity (3), and DEI staff and programs endowed with power and intention (3) to bring accountability for outcomes, especially from senior leadership (4). Participants want to see urgency for implementing the racial equity plan (2).

5) **Behavior Support Tools**: Participants would like to see new and updated toolkits developed to support equitable conversations, calling each other in, and driving towards outcomes (3).

6) **TU Familiarity and Adoption**: Participants also shared their perspectives on Targeted Universalism (TU) and whether it should serve as a framework in Metro's future racial equity initiatives. Overall, TU gets mixed reviews.

TU was originally included in SPAREDI as outlined in the "Metro's Approach to Racial Equity" section of this Memorandum. Participants shared that Metro at the start was explicit about taking a TU approach to racial equity by targeting disparities for some populations that would ultimately benefit the whole community, but they believe some at Metro have lost this thread (2). However, TU was inaccurately defined in SPAREDI and is discussed across Metro in a variety of sometimes contradicting ways which has likely contributed to confusion about TU's meaning and application among stakeholders. Participants across stakeholder groups rated their TU familiarity between 1 and 5 out of 10 (10 being the most familiar). Some Participants feel TU is jargony and opaque which for them can feel unsafe (2).

Some Participants have a vision of building a shared understanding of TU and an inclusive culture at Metro where all employees can thrive (5) with universal goals for the entire region plus specific strategies for every part (3), as the TU framework dictates. As was shared above, Participants across SLT, Council and RELT reported that some DEI programming at Metro is too narrow (4) and is not taking a universalist lens that would consider benefits to the whole community while still targeting as needed. Some say TU is already being applied at Metro including efforts to engage in co-creation and include all voices (2). Other Participants fear that a shift to TU can risk feeling like race erasure and backsliding (3).

If collectively implemented, these ideas for the future of racial equity at Metro have the opportunity to be an antidote to barriers and challenges in that each idea is responsive to at least one of the barriers and challenges outlined above, with all barriers and challenges having at least one responsive idea. In addition, these ideas can leverage Metro's strengths, help build on its achievements, and scaffold the transition of racial equity into its next iteration at Metro. The first five ideas all align well with the sixth, (Targeted Universalism), so much so that if Metro chose to heed Participant suggestions to adopt TU and if this was done to fidelity, idea numbers 1, 2, 4 and 5 would be a natural part of the TU application process. However, if all four stakeholder groups agree to Metro adopting TU as a part of its future racial equity approach, successful application will require Metro to address the misunderstanding and misuse of TU within Metro. In addition, Metro will need to address concerns raised about TU and build trust that the adoption of TU IS Metro remaining committed to racial equity and that TU aids in Metro working towards a region where race can no longer be used to predict life outcomes and where outcomes for all groups are improved.

Metro
Targeted Universalism Learning and Alignment
Council Retreat
December 9 & 11, 2025
Oregon Convention Center

Retreat Purpose and Assumptions

The Targeted Universalism Learning and Alignment project is intended to align four stakeholder groups on clarifying Metro's approaches to racial equity and whether Targeted Universalism should be included. This project is also intended to be responsive to the Racial Equity Assessment through co-created recommendations that will support the advancement of racial equity at Metro. This project is intended as a precursor to the SPAREDI refresh strategic planning work to come.

This retreat is an opportunity for Metro Council to consider and build on recommendations resulting from the Committee On Racial Equity (CORE) and Racial Equity Leadership Table (RELT), in order to put forward a final set of recommendations for the Senior Leadership Team's consideration and that will ultimately go to all stakeholder groups during a joint alignment retreat in early 2026. A few things to note:

- This project will shape the way Metro advances racial equity going forward and Council holds a unique perspective in the process including setting tone that impact organizational culture, clarifying expectations, and supporting accountability to SPAREDI.

- Shared leadership and co-creation are central approaches to this project, thus please be prepared for collaborative dialogue, iterative discussion, and "on-the-fly" alignment building over the two days.

- Like all the retreats in this process, this retreat will ask participants to indicate their level of agreement on recommendations via a gradient of agreement scale (fist to 5). Using consensus to align on recommendations may require discussing areas of divergence or disagreement, collectively considering challenging or nuanced topics, and compromising in order to reach an acceptable level of consensus.

- Your thought partnership and creative ideas are needed in the retreat and process, please be prepared to bring them in!

Retreat Objectives

All Stakeholders

1) Baseline understanding of Targeted Universalism (TU) as well as organizational culture and how to change it.

2) Align on desired changes to Metro's culture based on aspects of culture identified in the Assessment.

3) Align on Metro's future approaches to racial equity to inform the refreshed SPAREDI.

Council

4) Clarify how Council will apply its decision-making role to advance racial equity and reinforce accountability to the refreshed SPAREDI.

5) Identify how to provide Council with the most effective, concise, and actionable information and engagement opportunities to support clear, consistent leadership amid their constrained time and competing priorities.

6) Clarify how Council will receive and consider advice from CORE.

Preparation Materials

Please review the following materials in advance of the retreat.

1. [Project Overview](#)

2. Retreat Agenda below

3. [Recommendations](#) from the Committee on Racial Equity (CORE) and Racial Equity Leadership Table (RELT) on racial equity approaches, RELT structure and role, CORE's role in relationship to Council, and DEI Department's role

Previous shard materials:

4. Assessment & Summary Slide Deck – We will have printed copies at the retreat
5. [Overview](#) and [short video](#) on Targeted Universalism

Agenda Day 1, 8:45 AM – 4:00 PM

Time	Activity
8:45 – 9:15 AM	**Arrival, Settle In, Breakfast**
9:15 – 10:00 AM	**Opening** • Meeting is called to order by President Peterson • Welcome from President Peterson • Opening comments from Sebrina • Seed opening comments • Set retreat into context and set intention for the retreat • Review retreat objectives and day 1 agenda • Review consensus and gradient of agreement • Agree on retreat norms • Brief warm up activity

10:00 – 11:00 AM	**Interactive Training on Targeted Universalism**
	• Targeted Universalism (TU) (10-10:30)
	  o Game – TU myth vs fact
	  o Overview of the framework and its purpose
	  o Review the 7 stages of TU
	  o Relationship between racial equity and TU
	  o Case Studies/Examples of TU application
	• Q&A and Large Group Discussion

11:00 – 11:15 AM	**Break**
11:15 AM – 12:15 PM	**Interactive Training on Culture and Presentation of Racial Equity Assessment** • Organizational culture, including Council's impact on values, focus, power dynamics, risk, fear, and culture change • Summary presentation of Assessment
12:15 – 12:45 PM	**Racial Equity Assessment Discussion** • Large group Q&A and reflection discussion • Transition to lunch
12:45 – 1:30 PM	**Lunch Break**
1:30 – 1:45 PM	**Energizer Activity**

Time	Activity
1:45 – 3:00 PM	**World Café - Recommendations on Council Objectives (role, supports required, engagement with CORE)** ● Council splits into 3 pairs or 2 small groups ● Three tables set up with 3 objectives ● Small group spend time at each table discussing the specific objective and sharing recommendations ● Groups rotate to next table, 3 rotations in all ● Recommendations are posted on the wall of the main space
3:00 – 3:45 PM	**Recommendations on Council Objectives – Full Group Gallery Walk and Consensus Building** ● Councilors walk the room reviewing and reacting to the synthesized set of recommendations for the 3 objectives ● Discuss and modify recommendations as needed to reach a consensus alignment
3:45 – 4:00 PM	**Next Steps and Adjourn** ● Gratitude ● Preview of Day 2 ● Housekeeping items ● Meeting adjourned by President Peterson

Time	Activity
8:45 – 9:15 AM	**Arrival, Settle In, Breakfast**
9:15 – 9:30 AM	**Opening** ● Meeting is called to order by President Peterson ● Welcome, Appreciation for Day 1, brief recap of Day 1 ● Review intention, objectives and agenda for Day 2 ● Reminder of retreat norms and consensus decision-making
9:30 – 10:30 AM	**Align on Recommendations for Council Objectives (from day 1)** ● Individual quiet reflection on the ideas brainstormed the previous day ● Pair share of individual reflections ● Large group conversation ● Discuss and modify recommendations as needed to reach a consensus alignment
10:30 – 10:45 AM	**Break**
10:45 – 11:45	**Racial Equity Approaches – Presentation, Feedback, Consensus** ● Seed presents summary slide that includes RELT and CORE input ● Large Group Discussion ● Feedback and modify recommendations as needed to reach a consensus alignment
11:45 – 12:45 PM	**CORE, SLT, RELT Recommendations – Presentation and Discussion** ● Present context and recommendations from RELT, CORE, and SLT retreats ● Q&A and brief large group discussion
12:45 – 1:30 PM	**Lunch**
1:30 – 1:45 PM	**Energizer**
1:45 – 3:00 PM	**CORE, SLT, RELT Recommendations - Feedback and Alignment/Consensus** ● Council splits into 2 small groups who note what recommendations they align with and what they want to add/change. ● Each small group shares their response to the recommendations

Time	Activity
	● Discuss and modify responses as needed to reach a consensus alignment
3:00 – 3:30 PM	**Next Steps and Close** ● Celebration and appreciation ● Reflections ● Next steps ● Meeting adjourned by President Peterson