

Metro Equity Planning & Evaluation Tool

The 710 Coalition has been convened to develop multimodal and multipurpose strategies, projects and programs, and investment priorities to advance social equity, environmental sustainability, economic vitality, and access to opportunity for local communities and the Los Angeles region. Metro recognizes that deep-rooted and pervasive racial and socioeconomic inequities exist that create disparate impacts, even when the intention is to help all, and we must understand the root causes of those inequities to develop solutions that help those faring the worst to improve access to opportunity for all.

The **Equity Planning & Evaluation Tool (EPET)**, which begins on page six, is tool to enhance this process and help ensure equitable outcomes. It will assist the 710 Coalition in 1) identifying disparities that impact mobility, economic opportunities, and health outcomes, and how related services, programs, and projects are experienced; 2) understanding the root causes of those disparities, and 3) developing and implementing strategies, projects, programs, and investment priorities in a manner that provides more equitable outcomes.

What is “Equity”?

Equity is both an outcome and a process to address racial, socioeconomic, and gender disparities, to ensure fair and just access – with respect to where you begin and your capacity to improve from that starting point – to opportunities, including jobs, housing, education, mobility options, and healthier communities. It is achieved when one’s outcomes in life are not predetermined, in a statistical or experiential sense, on their racial, economic, or social identities. It requires community informed and needs-based provision, implementation, and impact of services, programs, and policies that reduce and ultimately prevent disparities.

Equity means that Metro’s service delivery, project delivery, policymaking, and distribution of resources account for the different histories, challenges, and needs of communities across Los Angeles County; it is what we are striving towards.

How should we use the Equity Planning & Evaluation Tool?

The EPET should be used as a guide throughout the 710 Coalition’s process. The tool should be reviewed by the Coalition at the beginning of the planning process and revisited to answer questions throughout the development and implementation processes. The questions are best answered by a diverse group, including people with a variety of demographic backgrounds, lived experiences, and expertise.



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The following definitions, guidance, and examples will help you complete the EPET.

Glossary of Key Terms

- **Community** = A geographic and/or social group of people with a shared identity, affiliation, and/or origin. For EPET purposes, “community” includes people who may be served or are otherwise impacted by Metro’s services, including but not limited to, Metro riders, program participants, residents and/or local business owners.
- **Community Results** = The community level condition of well-being we would like to achieve. It lacks disparities based on race, income, ability, or other social demographic.
- **Community Indicator** = Quantifiable measures of community results, disaggregated by race/ethnicity and income.
- **Equity Opportunity** = A decision that is designed to enhance positive impacts or reduce negative impacts for historically marginalized communities or others facing disparities in access to opportunities.
- **Ground Truth** = To validate or ensure assumptions and recommendations with external stakeholders, particularly those that will be most impacted by future actions.
- **Opportunity Areas** = Key indicators of success including Employment, Housing, Education, Health, Transportation, Community Development, Criminal Justice, Environment, and Safety.
- **Proposal Outcome** = A clearly defined future state of being at the program, local, or agency level resulting from the proposed action that ultimately supports the community result.
- **Performance Measure** = Quantifiable measures to forecast and track how well the proposed action will work or is working. They may be quantitative, qualitative, or otherwise describe actual impact. They may also be short-term, mid-term, or long-term.
- **Root Cause** = The fundamental baseline reason for a problem or situation; there may be multiple “steps” between the root cause and the identified problem(s) but these steps are directly connected through cause-and-effect.
- **Stakeholder** = A broader term than extends beyond “Community” (above) and includes individuals and organizations both engaged in and impacted by Metro’s services and investments, but may not share a geographic, social or cultural identity, affiliation and/or origin. For EPET purposes, this may include elected officials, municipalities and jurisdictions, public agencies, large and/or private corporations, etc.

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Proposed Action:

Team Members:

1. **Connecting Community Results to Project Outcomes:**

- a. Briefly describe the issue(s) you intend to address. This may include a proposed but not fully designed policy, program, initiative, plan, project and/or other proposed action.
- b. What opportunity area(s) does this proposed action have the ability to impact? (Ex: Employment, Mobility, Health, Education, etc.)
- c. What are the desired community results¹ to which this action will contribute?

¹ See the “Desired Community Results and Sample Proposal Outcomes” below.

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2. Analyze Data:

- a. List your data sources, including qualitative, quantitative, or anecdotal.²
- b. Is there an impacted geographic area? If so, what is the geographic area?
- c. What are the demographics of impacted area, users, or other community?
- d. What does the data tell us about existing community disparities in race, ethnicity, and income, that may influence the proposed action's outcomes? (Ex: Unemployment rates, housing-cost burden, park access, traffic collisions, asthma rates, etc.)
- e. What disaggregated performance metrics data do you have available for your proposed action? Consider data associated with similar or related programs, policies, services, or infrastructure.
- f. Does the performance metrics data show any existing disparities in race, ethnicity, income, etc. related to your proposed action potential impact? (Ex: pedestrian deaths are higher for black residents) If so, what is the root cause?³
- g. What would be a more equitable outcome? (Ex: pedestrian deaths are proportionate for all races and decreasing everywhere)
- h. What data are we missing, which might be more helpful in analyzing the proposed action , and how can we obtain it?

² See the list of potential data sources below.

³ Ask why at least five times. Social disparities today are often the result of a domino effect of policies, programs, decisions, and practices stemming from a root cause; it often takes time to determine.

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3. Engage the Community⁴:

- a. What do we know about the community, particularly any marginalized groups, and their history, relationship, or previous engagement with Metro?
- b. What historic investments, decisions, events, developments, or disinvestment strategies have contributed to current community conditions and how have they been considered in this proposed action?
- c. Who are the community members most vulnerable to negative impacts and/or living in historically marginalized or neglected areas that are affected by this proposed action? Consider community members that might be indirectly or unintentionally impacted.
 - i. How and at what stages did you engage them? (Ex: focus groups, surveys, community meetings, consultation with advisory boards, CBO partnership, etc.)
 - ii. How did you provide the information and tools they needed to fully participate as a partner?
 - iii. Did they raise concerns about other disparities or problems that this proposed action could address?
 - iv. Were there barriers that prevented some community members from engaging with Metro?
- d. What did you learn from the engagement about the root causes that produce or perpetuate racial/ethnic, income, or other inequities related to this proposed action?
- e. Given what you have learned from the data and asking the community, who is most likely to benefit or be burdened from this proposed action? What are the potential unintended impacts or consequences of the proposed action?

⁴ See the list of community engagement resources below.

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4. Plan for Equitable Outcomes:

- a. How has your proposed action been designed to ensure equitable outcomes?
- b. How will your proposed action address root causes to decrease racial/ethnic, income, and/or other inequities, increase positive outcomes, and reduce negative impacts on historically marginalized communities?
- c. How has your community engagement with those most affected by your proposed action informed your desired proposal outcomes and plan?
- d. What performance metrics will measure and track impacts?
- e. How will the anticipated proposal's impact support your desired community result(s) in section 1?
- f. Are there any unresolved issues? Are there complementary strategies that you can implement to support more equitable outcomes? Can existing partnerships maximize positive impact of your proposed action?
- g. How does advancing equity through this proposed action help achieve any of the Vision 2028 Goals?



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5. Proposal Implementation

For proposed efforts that Metro directly manages, controls, develops, implements, and/or coordinates:

- a. Describe your implementation plan, including any transition to Program Management, Operations, or another Metro implementing team.
- b. How will you engage stakeholders through implementation? What percentage of the total project budget for implementation is dedicated to community engagement? (Ex: Translation services, social & print media, meetings, etc.)
- c. Is your plan realistic, considering the timeline, project scope, past related efforts, political conditions, and need to complete any required federal or state equity assessments (Ex: Title VI Equity Analysis, CEQA, etc.)?
- d. Does the implementing team have adequate personnel, resources, and/or mechanisms to ensure successful implementation and/or enforcement?
- e. Is the proposed action adequately resourced to ensure on-going data collection, public reporting, and community engagement as noted below?

For proposed efforts that Metro may fund, coordinate, and/or initiate but does not directly implement:

- a. Describe Metro's role in the proposed action and, if any, in the final product implementation. Even if Metro does not have a direct role in final implementation, also describe intended outcomes or final products.
- b. Describe any engagement activities that Metro either conducted and/or required of implementers as part of the proposed action, including budget or funds allocated to engagement.
- c. Describe any data collection activities that Metro either conducted and/or required of implementers as part of the proposed action. Also describe to what level the data is disaggregated.

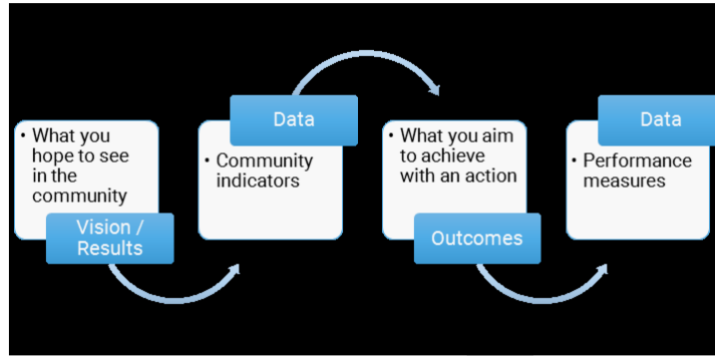
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6. Evaluate, Communicate, and Stay Accountable

- a. If a different Metro team will implement the plan, meet with that team to discuss program evaluation, ongoing community engagement, data collection, and an accountability plan.
- b. How will actual racial and socioeconomic equity impacts and project outcomes be measured, documented, and evaluated? What data needs to be collected and how will you collect it?
- c. What is your plan to report back to the community with updates from ongoing project evaluations and findings?
- d. What is your communication and engagement strategy to address unintended negative or major project impacts?
- e. How will you continue to partner and deepen relationships with stakeholders and other agencies to ensure internal and public accountability?
- f. Prepare and attach a summary of your EPET analysis. Explain who the action might impact, noting specific historically marginalized communities or others facing disparities in access to opportunities, and how the action is designed to 1) enhance positive impacts and/or 2) reduce negative impacts for them. Note any mitigations for negative impacts. Use this summary in any associated board report, box, or other document explaining this decision.

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Creating Effective Community Results and Proposal Outcomes



Source: Curren R., Nelson, J., Marsh, D.S., Noor, S., Liu, N. "Racial Equity Action Plans, A How-to Manual.": Haas Institute for a Fair and Inclusive Society, University of California, Berkeley, 2016

Desired Community Results

Proposal Outcomes:

See sample responses below.

Opportunity Area	Equitable Community Result	Community Indicator (Lists of are not exhaustive.)	Proposal	Equitable Proposal Outcome	Performance Metric
Employment	All people have access to high-quality living wage jobs and unemployment is low.	Unemployment Rates; Average Household Income; Average Commute Time; Transit availability; etc.	Bus Service Realignment	Increase bus options to jobs for low-income and communities of color.	Number and type of jobs accessible by bus within a typical commuting time by census tract.
Housing	All people have access to safe and affordable housing options and protections.	Housing cost burden; Home ownership rate; number of people that are unhoused; etc.	Joint Development Project	Increase the number of affordable rental housing options	Number of housing units affordable to most low-income residents.
			TOC Policy and Implementation Plan	Improving housing stability near transit for low-income renters	Number of cities with tenant protection policies.
Education	All people have access to affordable, high-quality, and culturally sensitive educational opportunities.	Access to educational facilities; Educational attainment; etc.			
Health and Safety	All people have access to health resources and a healthy and	Life expectancy; Health insurance coverage; Access to health facilities; Park			

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	sustainable built environment and land uses.	access; Rates of childhood obesity and asthma; Access to fresh/healthy food retail; etc.			
Transportation	All people have access to safe, affordable, and sustainable mobility options that connect all communities to resources and opportunities.	Non-private vehicle travel mode share; rates of traffic-related fatalities and serious injuries; transportation cost burden			
Community Development	There are equitable opportunities for businesses, community investment, and economic opportunity that protects and preserves legacy businesses and cultural character.	Percentage of businesses owned by women and people of color; Duration of small/independent businesses serving marginalized communities			
Criminal Justice	All people experience equal rights, treatment, and protection under the law, free from discriminatory enforcement or impacts.	Arrest rates; fare evasion ticketing rates; crime rates; rates of personal searches, etc.			
Environment	All neighborhoods are free from toxic exposure and pollution with access to clean and healthy open spaces and infrastructure.	Reduction in greenhouse gas emissions; Particulate matter concentrations; Number or rate of sensitive uses (homes, schools, childcare, senior facilities) within 500 feet of high-pollutant sources,			

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		such as freeways, active oil drilling, and manufacturing/ industrial uses; access to safe drinking water			
Safety	All people have access to safe roads and streets, regardless of geography as well as all users of Metro's transit system feel comfortable and at ease when using the service.	Decreased collisions involving someone killed or severely injured; decrease in specific crash type in a project area over time; user experience of safety on transit system			

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Here are potential resources to use in answering the questions in the “Analyze Data” and “Engage the Community” sections.

Potential Data Sources

- United States Census Bureau - <https://data.census.gov/cedsci/>
- National Equity Atlas - <https://nationalequityatlas.org/>
- Enterprise Opportunity 360 - <https://www.enterprisecommunity.org/opportunity360/measure>
- CalEnviroScreen - <https://oehha.ca.gov/calenviroscreen>
- Race Counts - <https://www.racecounts.org/>
- Healthy Places Index - <https://map.healthyplacesindex.org/>
- Transportation Injury Mapping System - <https://tims.berkeley.edu/>
- SCAG Local Profiles - <http://www.scag.ca.gov/DataAndTools/Pages/LocalProfiles.aspx?openitem=3>
- USC Price Center for Social Innovation Neighborhood Data for Social Change - <https://data.myneighborhooddata.org/stories/s/xs7q-jqmb>
- Metro Equity Focused Communities Map
- NextGen Transit Propensity Map

Potential Community Engagement Resources

- PolicyLink Community Engagement Guide for Sustainable Communities - <https://www.policylink.org/resources-tools/community-engagement-guide-for-sustainable-communities>
- King County Community Engagement Guide - https://www.kingcounty.gov/exec/equity/~/_media/5CCCBCFFBA8F405191A93BB D5F448CBE.ashx
- Nelson Nygaard Principles For Equitable Public Outreach & Engagement During Covid-19 and Beyond - <https://nelsonnygaard.com/principles-for-equitable-public-outreach-engagement-during-covid-19-and-beyond/>
- Simon Fraser University Beyond Inclusion: Equity in Public Engagement- <https://www.sfu.ca/content/dam/sfu/dialogue/ImagesAndFiles/ProgramsPage/EDI/BeyondInclusion/Beyond%20Inclusion%20-%20Equity%20in%20Public%20Engagement.pdf>
- Collective Impact Forum Community Engagement Toolkit- <https://www.collectiveimpactforum.org/sites/default/files/Community%20Engagement%20Toolkit.pdf>
- City of Portland Community Engagement Manual- https://www.portland.gov/sites/default/files/2019-11/comm_engage_manual.pdf
- Lidiya Girma Community Engagement Planning Guide - https://sustainablect.org/fileadmin/Random_PDF_Files/Equity_Action_PDFs/CommunityEngagementPlanningGuide.pdf

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- State of Washington Department of Health Community Engagement Guide - <https://www.doh.wa.gov/Portals/1/Documents/1000/CommEngageGuide.pdf>

The EPET was developed using guides, reports, and other tools including:

- Nelson, J., Brooks, L. “Racial Equity Toolkit: An Opportunity to Operationalize Equity.”: Haas Institute for a Fair and Inclusive Society, University of California, Berkeley, 2016
- Curren R., Nelson, J., Marsh, D.S., Noor, S., Liu, N. “Racial Equity Action Plans, A How-to Manual.”: Haas Institute for a Fair and Inclusive Society, University of California, Berkeley, 2016
- Bernabei, Erika. “Racial Equity: Getting to Results.”: Government Alliance for Race and Equity, 2017
- Seattle Racial Equity Toolkit
- Metro Transit (St. Paul, MN) Equity Tool
- COVID-19 Equity Framework and Rapid Response Tool (City of San Antonio, Office of Equity)

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