



COUNCIL STAFF REPORT

To: Mayor and City Council
Ann Ober, City Manager

Date Written: Oct. 6, 2023

From: Emma Sagor, Assistant City Manager, and
Gabriela Santoyo Gutierrez, Equity and Inclusion Coordinator

Subject: **Equity Study Report and Workplan Update**

ACTION REQUESTED

Council is asked to receive a report and presentation about the results of the recently completed diversity, equity, and inclusion assessment conducted by Keen Independent Research. Council is also asked to hear an update on staff’s efforts to develop an equity work plan and provide their direction on priority action areas.

HISTORY OF PRIOR ACTIONS AND DISCUSSIONS

[July 14, 2020](#): Council discussed a proposed resolution in support of diversity, equity, and inclusion (DEI) and the Black, Indigenous, and People of Color (BIPOC) community crafted by Mayor Mark Gamba and Councilor Kathy Hyzy.

[August 18, 2020](#): Council approved a resolution changing its goals to include one focused on equity, inclusion, and justice.

[November 16, 2021](#): Council made its first set of appointments to the Equity Steering Committee (ESC).

[October 4, 2022](#): Council received an update on its equity, inclusion, and justice goal, including an overview of the city’s contract with Keen Independent Research to conduct a comprehensive inclusion and belonging study to assess the state of equity in how the city serves the public and operates as an employer.

ANALYSIS

Background

Council adopted its equity, inclusion, and justice goal in August 2020, and reaffirmed this as a goal in April 2023. The ESC was created in August 2021 and has been working with the city to advance equity initiatives since then.

In fall 2022, the city contracted with Keen Independent Research to conduct a comprehensive diversity, equity, and inclusion study to assess the state of equity in how the city serves the public and how we operate as an employer. Keen Independent Research is an equity research and consulting firm that has performed similar work for public organizations in Oregon and across the country. The study was intended to inform the development of a diversity, equity, and inclusion workplan for the city.

Assessment methodology and engagement

The assessment report (see appendix A) explains the tools and methods used by the Keen Independent Research team to conduct their assessment. Their scope of work included:

- Analysis of the city's policies, procedures, and budgets
- Examination of city workforce and hiring data
- Interviews with city staff
- Review of prior employee and community surveys
- Virtual workshops with employees and members of the public

In total, Keen Independent collected input from nearly 250 participants (not counting surveys Milwaukie previously administered that informed this analysis).

Key findings, consultant recommendations, and emerging staff and ESC priorities

The assessment report (appendix A) includes findings on the following topics:

- **Employment:** The team reviewed hiring and employment data and found that people of color are underrepresented among the city workforce compared to local and regional demographics. While 24% of the local population are people of color, only 8.1% of staff are. This was an increase from 2017, when 6.6% of staff identified as people of color. Additional employee-related quantitative and qualitative data was analyzed, and findings were shared with internal stakeholders.
- **Procurement:** The team examined equity in city contracting practices. Their analysis found that the city's bid management system has significant limitations to its functionality that, if improved, would enable more equitable notification, identification of Oregon Certification Office for Business Inclusion and Diversity (COBID) certified firms, and reporting to track equity outcomes. Their qualitative research revealed some positive perceptions of the city's efforts to advance equity in procurement, but also opportunities for improvement, specifically around direct outreach to minority-owned, women-owned, service-disabled veteran-owned, and emerging small businesses.
- **Services to the community:** The team interviewed staff and held virtual workshops with the public to analyze equity in city service delivery. This analysis revealed opportunities to create more equitable utility rate structures, to better communicate how equity is considered in maintenance and infrastructure decision making, to continue training staff across departments on customer service and cultural competence, and to make city events more inclusive.
- **Public engagement and communication:** The team analyzed existing communication practices and gathered feedback on this topic via interviews and public virtual workshops. The findings suggest the city employs robust public engagement processes and has several methods of fielding community members concerns. However, there are opportunities to further expand communication, so more people know about what is going on in the city and to enhance communication around the city's equity work.

The report also includes dozens of recommendations within these four areas for the city to consider as it develops its equity and inclusion workplan. Three recommendations per section were called out by the Keen Independent team as suggestions for what would be particularly impactful:

- **Employment:**
 - Further expand recruiting of diverse groups for jobs with few diverse workers.
 - Standardize the application screening and scoring processes through Human Resources (already implemented)
 - Continue to monitor rates of hiring, promotions, and separations and explore reasons for disparities.
- **Procurement:**
 - Reach out to small, diverse businesses for bids for procurements under the threshold requiring formal competitive process.
 - Consider investing in a bid management system with more robust reporting and bid solicitation capabilities.
 - Consider participating in a disparity study to examine whether minority and women-owned firms receive an equitable share of city contract dollars.
- **Services to the community:**
 - Consider expanding translation and multilingual messaging regarding services and fee relief programs.
 - Continue to promote income-based programs that provide relief from fees across the city's communication channels.
 - Determine key metrics for community satisfaction with events and services that will support future decision-making.
- **Public engagement and communication:**
 - Invest in telling the Milwaukie story (including around DEI) highlighting changes and achievements.
 - Expand multilingual communications (particularly Spanish) throughout all communications platforms.
 - Publicize the city's efforts at advancing physical accessibility and going beyond Americans with Disabilities Act (ADA) compliance.

The Keen Independent team attended the August 25, 2023, meeting of the ESC to present these findings and their recommendations. The committee and support staff held an initial discussion around what areas are rising as priorities for them, but also wanted additional time to discuss and refine their goals for the coming year. These emerging priorities include:

- Strategies to improve diversity and representation in employment (recruitment, hiring, and retention).
- Communication opportunities, including around storytelling around our DEI work, Milwaukie's full history, and improving understanding of city processes and procedures.
- Engagement and outreach with BIPOC community members—particularly youth—to increase participation in city opportunities, such as hiring panels, internships, and committees.
- Collaboration with other committees to embed equity throughout the city's work.
- Ensuring capital projects (like parks) create opportunities for bringing people together accessibly and result in investment in diverse firms through equitable contracting.
- Accessibility practices, including language access, disability access, and inclusion of all ages.
- Naming policies for city spaces and places.

The ESC requested more time as a group to refine their priorities and advise staff. At their September 28, 2023, meeting, the ESC began documenting specific actions they could take to advance the before-mentioned priorities. These preliminary ideas can be viewed in [the meeting minutes](#). The ESC will meet again next during a weekend retreat on October 14 to further refine these ideas and select a maximum of three projects they would like to take on for the year ahead (in addition to the actions led by staff). Staff will share the outcomes of this prioritization process with Council at the October 17 regular session, and request feedback and additional input from Council.

Next steps and inclusion in organizational strategic plan

The city is in the process of developing a three-year organizational strategic plan, which will include specific goals, objectives, tactics, and performance measures. The plan will be finalized in February 2024 and guide departmental work from 2024-2027, including informing the biennial 2025 and 2026 budgeting process next year. Staff intend to integrate the equity workplan into this organizational strategic plan and incorporate the actions prioritized by the equity and inclusion coordinator, ESC, Council, and city leadership. Staff will provide updates to Council as this work continues.

BUDGET IMPACT

The workplan developed because of this study and the city's strategic planning process will inform our biennial 2025 and 2026 budget development process. Through that budget process staff may request funds to support equity priorities.

WORKLOAD IMPACT

Staff across city departments will be called upon to help support our equity work, led by the equity and inclusion coordinator. These efforts and trainings will be planned for and incorporated into staff workplans and the organizational strategic plan.

CLIMATE IMPACT

While the actions we plan to take on our equity workplan are not expected to have a direct climate impact, communities of color, people living with disabilities, and people living on low incomes are disproportionately impacted and at risk from climate disasters. Therefore, work we do to address and reduce disparities can also address that inequitable climate risk.

COORDINATION, CONCURRENCE, OR DISSENT

Staff from across all city departments were involved in the equity study. The strategic plan steering committee, which is comprised of staff from across departments, also has been engaged in this effort and will continue to advise on the integration of the equity workplan into our organizational strategic plan. The equity and inclusion team plans to work very closely with our human resource, finance, public works, and community development teams on the implementation of these strategies.

STAFF RECOMMENDATION

Staff recommend Council review the assessment findings and share with staff what actions they would like to see the city prioritize in the coming years. Staff are specifically interested in Council's perspective on the initial list of potential focus areas identified by staff and the ESC:

- Strategies to improve diversity and representation in employment (recruitment, hiring, and retention).

- Communication opportunities, including around storytelling around our DEI work, Milwaukie’s full history, and improving understanding of city processes and procedures.
- Engagement and outreach with BIPOC community members—particularly youth—to increase participation in city opportunities, such as hiring panels, internships, and committees.
- Collaboration with other committees to embed equity throughout the city’s work.
- Ensuring capital projects (like parks) create opportunities for bringing people together accessibly and result in investment in diverse firms through equitable contracting.
- Accessibility practices, including language access, disability access, and inclusion of all ages.
- Naming policies for city spaces and places.

ALTERNATIVES

Council could suggest other priorities for staff to consider.

ATTACHMENTS

1. DEI Assessment Report Final Draft from Keen Independent Research



Equity Study Report and Workplan Update

October 17, 2023

1. How we got here
2. Diversity, equity, and inclusion assessment results and recommendations from Keen Independent Research
3. Focus areas for further work planning + ESC priorities
4. Discussion and questions

HOW WE GOT HERE



- **August 2020:** Council adopts equity, inclusion, and justice as a goal
- **August 2021:** Equity Steering Committee established
- **Fall 2022:** Keen Independent Research begins comprehensive assessment of equity in city services and operations
- **Fall 2023:** Assessment complete; new Equity and Inclusion coordinator hired

City of Milwaukie DEI Plan Recommendations



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September 5, 2023

**KEEN
INDEPENDENT
RESEARCH**

Methodology



Source: City of Milwaukie

Project approach

- § Assess where the City is with ongoing DEI efforts
- § Collect stakeholder input
- § Identify areas of opportunity for improvement

Methods

- § Review of workforce policies, procedures and surveys
- § Workforce data analysis
- § Review of procurement policies and procedures
- § Interviews with key staff
- § Virtual workshops with staff, business owners, residents (input from about 250 individuals)

Findings — Employment

City workers, by race, ethnicity and gender, 2017 and 2022

	2017	2022
Race/ethnicity		
African American	0.0 %	2.0 %
Asian American	2.9	1.3
American Indian and Alaska Native	0.0	0.0
Native Hawaiian or other Pacific Islander	0.0	0.7
Hispanic American	3.7	4.0
Total people of color	6.6 %	8.1 %
Non-Hispanic white	93.4	92.0
Total	100.0 %	100.0 %
Gender		
Women	46.0 %	41.6 %
Men	54.0	58.4
Total	100.0 %	100.0 %

Disparities in overall workforce

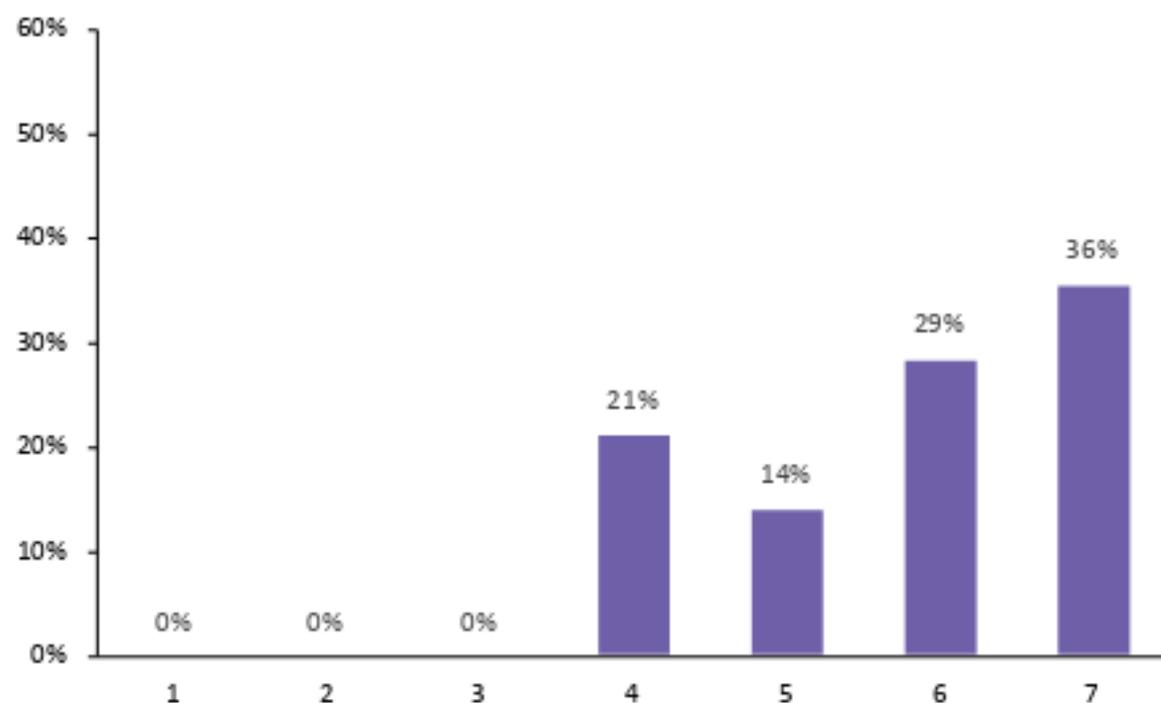
- § Substantial for people of color across departments
- § Men and women are generally on par with some variation between departments

Disparities in hiring

- § Substantial disparities for people of color across departments
- § No gender disparities observed

Findings — Procurement

Virtual workshop respondents' ratings of equity in City's procurement process



Bid Management System

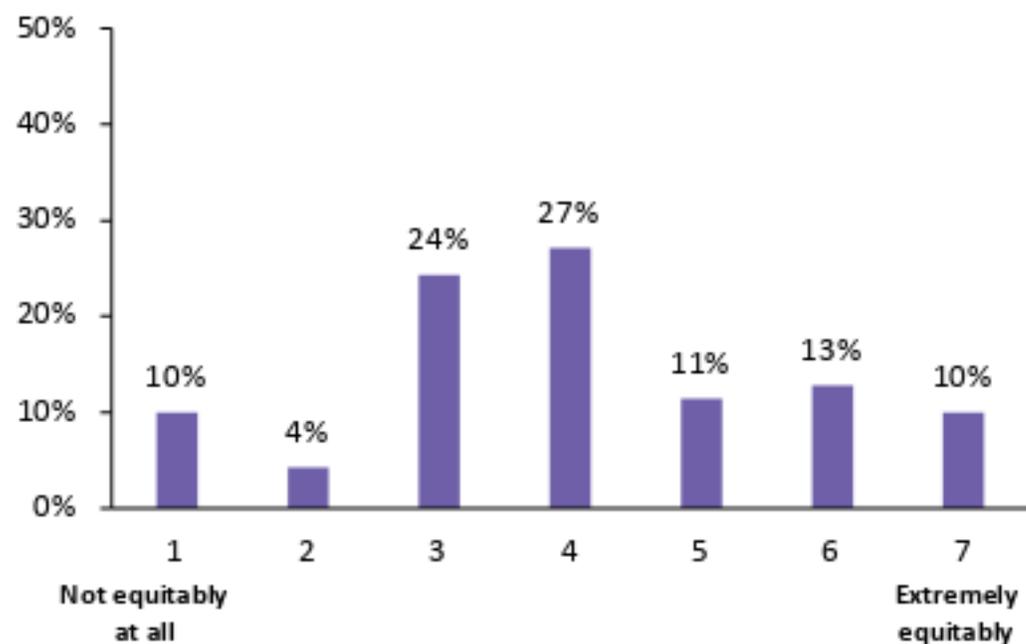
- § Limited in collection of vendor data
- § Limited in bid solicitation notification capabilities

Expanding access to City work

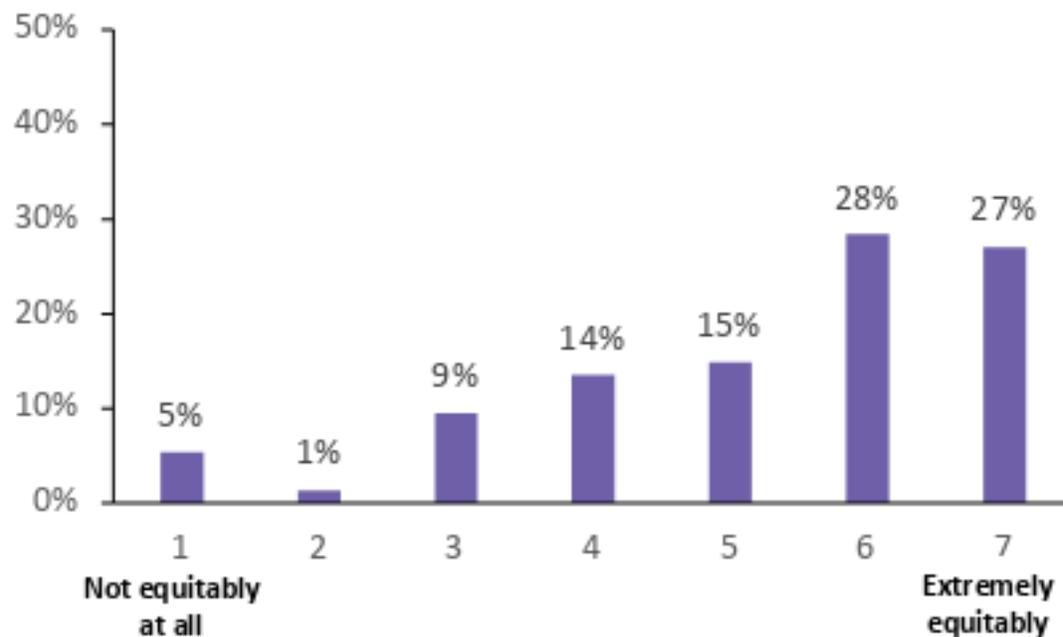
- § Outreach to local businesses
- § Direct communication with diverse firms

Findings — Services to the community

Virtual workshop participants' ratings of how equitably the City performs its street maintenance

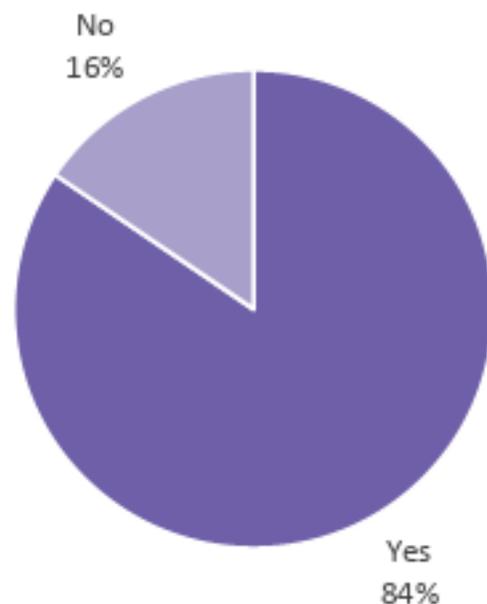


Virtual workshop participants' ratings of how equitably the City provides other services



Findings — Public engagement

Virtual workshop participants' indication of whether it is clear the City prioritizes DEI for residents



Perceptions of DEI within Milwaukee

- § Hiring at the City could be more reflective of the diversity of the residents
- § City personnel could be more accessible
- § Apply DEI principles widely (e.g., with the naming of new buildings or parks)

Events

- § Opportunities to celebrate other cultures or make existing events more inclusive
- § Communications regarding events are not reaching all residents of the city

High-Priority Recommendations

Employment

- § Further expand recruitment of diverse groups for jobs with few diverse workers
- § Standardize the application screening and scoring processes through Human Resources (already implemented)
- § Continue to monitor rates of hiring, promotions and separations and explore reasons for any disparities

Procurement

- § Reach out to small, diverse businesses for bids for procurements under the thresholds requiring formal competitive processes
- § Consider investing in a bid management system with more robust reporting and bid solicitation capabilities
- § Consider participating in a disparity study to examine whether minority- and woman-owned firms receive equitable share of City contract dollars

High-Priority Recommendations (continued)

Services and service delivery

- § Consider expanding translation and multilingual messaging regarding services and fee relief programs
- § Continue to promote income-based programs that provide relief from fees across the City's communication channels
- § Determine key metrics for community satisfaction with events and services that will support future decision-making (along with staff input and up-to-date best practice literature)

Public engagement and communications

- § Invest in telling the Milwaukie story (including around DEI), highlighting changes and achievements
- § Expand multilingual communications (particularly Spanish) throughout all communications platforms
- § Publicize the City's efforts at advancing physical accessibility and going beyond ADA compliance

FOCUS AREAS FOR FUTURE WORK

- 1. Recruitment, hiring and retention** – Improving diversity in employment (*improvements implemented and underway*)
 - Update hiring and recruitment practices; invest in work culture and staff support; improve internal engagement
- 2. Communication, transparency, and storytelling** – Highlighting Milwaukie's full history and demystifying government
 - Increase public communications around equity work (Pilot features, social media); evolve city events calendar
- 3. Engagement pathways** – Creating pipelines to opportunities within the city, particularly for youth
 - Explore internship and job shadow opportunities; improve recruitment for boards & committees; engage youth on how they want to be involved



FOCUS AREAS FOR FUTURE WORK

4. **Equitable procurement** – Investing in systems and analyses that ensure contract dollars are being invested equitably (*Council has acted in this area*)

- Update bid management system; revamp community grants program; continue improvements to contracting practices

5. **Accessibility** – Improving language access, disability access, age inclusiveness

- Update city's translation and interpretation policy; add multilingual signage; make ADA updates

6. **Naming of spaces and places** – Developing standards that celebrate diverse heritage and foster inclusion

- Create a policy around naming; work with partners to tell Milwaukie's full story



ESC FOCUS AREAS

#2 *Communication, transparency, and storytelling:*

- Advise on annual event calendar/budget
- Advise on communications campaign
- Advise on development of equity reporting process

#1 *Recruitment, hiring, and retention:*

- Serve on hiring panels
- Support annual job fair

#3 *Engagement pathways:*

- Advise on development of internship program
- Advise on recruitment strategy and youth engagement with boards and committees, NDAs

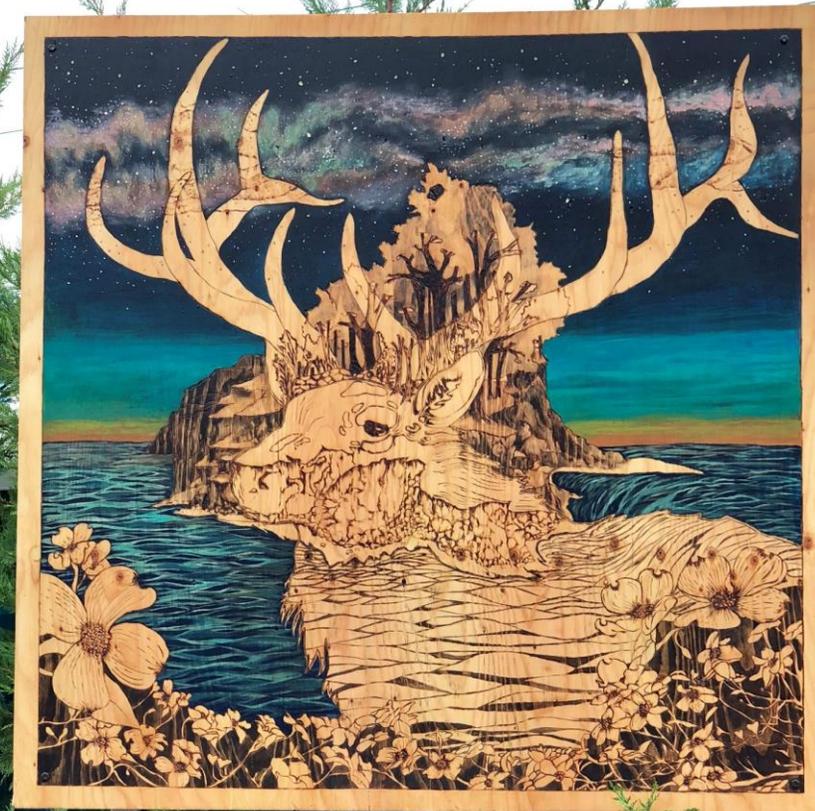


NEXT STEPS

- Equity Steering Committee (ESC) will continue refining their priorities and work plan based on Council feedback at their October 26 meeting
- Staff developing a three-year organizational strategic plan – equity actions will be integrated
- Return in December with a resolution documenting commitments

Asks of Council:

- *What focus areas do you most want to see the ESC and city prioritize?*
- *As we develop our next budget, what priorities are you interested in funding?*



The Spirit of
Elk Rock Island
Jillian Moody
Millsville Wood-Mural

**QUESTIONS OR
COMMENTS?**