![Multnomah County logo]

Workforce Equity Strategies:

Recommendations to Strengthen and Improve Efforts in Multnomah County

October 2018

Submitted to

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Submitted by

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Background and Purpose

Multnomah County, Oregon comprises vibrant communities, abundant natural resources and infrastructure, increasingly diverse populations with rich cultural traditions, an array of opportunities and services to support individual and population health and well-being. Now at the crossroads of history and opportunity, elected officials, residents, institutional and civic leaders are positioned to make significant contributions to the social justice landscape assuring equitable distribution of resources and equitable access to services and benefits. The Multnomah County Government (County) has joined jurisdictions across the nation and the world organizing around new and thoughtful approaches to reverse historical disparities in racial equity, diversity and inclusion and is becoming a model of local governments that promote safety, trust and belonging for its employees.

Considerable research documents the negative socioeconomic impact of inequity. National experts and field practitioners have concluded that discriminatory practices, whether intentional or not, damage specific population groups, entire organizations and communities overall. One such expert, Glenn Harris, President of the Center for Social Inclusion stated, "when a system is out of balance, people of color feel the impacts most acutely, but, to be clear, an imbalanced system makes all of us pay."[1]

Beginning in 2011, Multnomah County Government further engaged staff and community stakeholders in establishing Equity and Inclusion Guidelines. With the development of a robust Equity Lens through which departments were able to examine and implement programs, practices and other improvements, internal Equity Coordinators were hired across various departments, and other improvements were made to enhance organizational culture and the management of complaints. Significantly, the Office of Diversity and Equity (ODE) was created and staffed out of the Office of the Chair of the County Board of Commissioners. Employee Resource Groups (ERGs) were established or reinvigorated to offer networking and social support structures and have been instrumental over a number of years in impacting policies and practices across the organization. These groups, by policy, provide dedicated space for "employees with disabilities, immigrant and refugee employees, LGBTQ employees, employees and managers of color, Veterans, families, and older adults." ERGs generally contributed to Multnomah County's cultural landscape to benefit its workforce. They often rally around a common agenda to strengthen the County's commitments to equity, inclusion and diversity.

This discussion is not new for Multnomah County. In June 2016, the Metropolitan Workforce Equity Coalition, along with the Chief Operating Officer, Chief Human Resources Officer and Chief Diversity and Equity Officer presented to the Board of Commissioners high-level approaches for workforce equity, setting an initial foundation for subsequent work to come. Amidst considerable progress and new opportunities for previously unheard voices to be reflected in policy action, disturbing setbacks surfaced in the 2017 Human Resources Trends Report as well. Those developments increased skepticism and disbelief that Multnomah County Government was committed to a robust workforce equity agenda, and as James Baldwin and Martin Luther King, Jr. often reminded, government creeds and deeds have to be aligned more fully to gain workers' as well as public support. Staff also stayed abreast of the local community's discussions on racial disparities in relation

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[1] Glenn Harris, Center for Social Inclusion, https://www.centerforsocialinclusion.org/our-work/what-is-racial-equity/ (accessed August 3, 2018).

to employment. Taking all of this into account, County leaders and employees designed the Workforce Equity Strategic Plan (WESP), which was presented to and subsequently approved by the Board of County Commissioners (Board) on April 4, 2018. As a result of the employment trends study and strategies outlined in the WESP, the Chair determined that expert consultation was necessary to address concerns raised by the Employees of Color (EOC), the Employee Resource Groups (ERG), Office of Diversity and Equity (ODE) and the community. With some urgency, the Board authorized expenditures for conditions surrounding the identified setbacks to include recommendations for actions and accountability for implementation to be undertaken.

A contract was awarded to Jemmott Rollins Group (JRG) of Los Angeles, California, after a competitive bidding process. Work began in March of 2018 and concludes with the presentation of this report in final form to the Board of County Commissioners in October of 2018.

Complementing the WESP, the work reported in this document is grounded in the recognition and need for additional focus on equity issues. Therefore, one purpose of the document is to address workforce equity issues that surfaced in the 2017 HR Trends Report. The overall goal of the report is to provide recommendations that strengthen oversight and accountability, clarify management and supervision, overcome structural impediments and improve the complaints process.

Overview and Methodology

Overview

This document encompasses recommended strategies, goals and actions compiled from sources including the Workforce Equity Strategic Plan (WESP), interviews with key stakeholders in individual and small focus group settings, data on workforce trends from Multnomah County, literature review and work products from other jurisdictions, and from the work group appointed to support this work. The work group evolved into and is referred to as the Advisory Council for this report.

While we relied heavily on recommendations emerging from the efforts of the Advisory Council Work Groups (see Appendix 1), our recommendations result from an understanding and appreciation of the work groups, and our judgement and expertise in what can reasonably be implemented and evaluated in a three- to five-year performance period.

As Consultants, our approach and analysis sought to provide Multnomah County with our best thinking and synthesis via the suggested recommendations. While this report is comprehensive and will require additional investment to lead to success, we have staged the recommendations according to greatest impact and what is vital to address immediately (as indicated by the target timeframes we attached to them). What is required as next steps is to bring key stakeholders together to better digest the report, to thoughtfully and strategically identify next step and resources, and to mobilize.

Methodology

Consultants utilized conventional issue-exploration research techniques including secondary analysis of Countywide Employee Survey, HR Trends Report, focus groups, interviews with individual stakeholders, facilitation of large group meetings, guidance of work groups' priorities, field scan of workforce equity landscape, applying equity and racial equity-specific theory and practices, and review of related research on behavioral change in professional settings.

Most significantly, consultants employed an empowerment model where work groups were not just comprised of staff leadership, but also included those non-exempt employees adversely impacted by the system's weaknesses (i.e., initial representation from ERGs, a blend of exempt and non-exempt employees, multiracial, etc.) This empowerment model is further described in the following subsection bulleted as "Transformative Participatory Involvement."

In the course of the work, consultants applied relationship-building tools such as the Gibb Model, utilized equity and inclusion tools and approaches from Government Alliance on Racial Equity (G.A.R.E.) and synthesized a working logic model to provide the roadmap toward achieving outcomes and impacts (see Appendix 2).

Principles and Practices Informing Methodology

JRG recognizes certain risks associated with consultant-involved systemic change efforts in which outsiders serve as a driving force for long-term sustainable reforms. In too many efforts, once consultants are out of the picture, it is difficult to maintain momentum and prioritization of concerns dissolve. It is JRG practice and a pillar of foundational social change that those most affected by the changes have a formative role in making recommendations and in monitoring implementation as practices are implemented and evaluated. Therefore, it was important that a deliberative body with cross-cutting departmental leadership as well as line staff actively participate in the formation of recommendations. The following principles/practices guided the work of this report and are included to illustrate active involvement at each step of its development:

- Active engagement of those with lived experience of the problems being addressed, along with those who hold both the responsibility and authority to make changes.

- Inclusion and equity of voices in collaboration with the recognition that ultimate responsibility for change is outside the purview of the Advisory Council.

- Targeted Universalism, strongly referenced in the WESP, is based on recognition of shared universal goals for greater equity and inclusion. Targeted universalism seeks to increase diverse voices and selection of outcomes that better favor the broader goals as represented by an expanded universe of inputs. It requires explicit articulation of the universal goals being pursued from which all can benefit, along with the specific targeted strategies necessary to achieve such goals. Structural interventions and solutions follow such affirmatively set goals, while also speaking to the identification and removal of barriers.

- Transformative institutional change towards equity – specifically, racial equity – and belonging require structural, relational and interpersonal strategies and approaches. While deeply interconnected and related, this analysis and resulting report speak more to the first two areas.

- Transformative Participatory Involvement is another transformational practice by which key internal leadership and representatives of marginalized employees bring diverse perspectives and expertise to significant decisions. Inclusion of such stakeholders in monitoring progress of recommendations would also assure that multiple perspectives are considered in decision-making, allowing senior executive leadership (e.g., Board Chair, COO, etc.) vital insight and judgment for the critical decisions of hiring, promoting, training and talent development, terminations and release from service, and complaint resolution.

- The Advisory Council format leveled the playing field and promoted an environment of equity and inclusion for the members such that, regardless of their formal positions within the organization, their participation and recommendations held equal weight.

Highlights of the Methodology in Action

Consultants were provided with lists of both individuals and cohort groups within the County workforce and assisted in making contact to set up in-person and telephone interviews. Approximately 60 persons were reached and responded to open-ended questions such as:

- What concerns you most about the work environment of Multnomah County and your place in it?
- What are the big problems that need fixing?
- Are there issues related to race, gender, sexual preference, immigration or culture that come up at work?
- How are these issues of race equity and inclusion handled at work?

From these interviews, a list of issues and concerns was generated and narrowed to approximately 34 issues most relevant to equity and inclusion. A work plan was developed by consultants that involved selecting 17 employees from representative groups including Management, ERG, a representative of AFSCME Local 88, EOC, and Diversity and Equity Officers from Departments including Chair's Office, Administration, Central Human Resources, Health, Community Justice, County Assets and others.

Two retreats were held, consisting of two-day workshops with the 17 members of management and line staff appointed by the COO and Executive Team. The group was named the Advisory Council. During the first meeting participants were divided into four work groups after reviewing and prioritizing issues obtained in the stakeholder interviews. The interviewees included a blend of exempt and non-exempt employees as well as department heads.

The four work groups were:

1. **Management Issues** including workplace culture, training and communication.
2. **Structural Impediments** issues inclusive of organizational patterns of decision-making that resulted in power imbalances between Executive Team, Human Resources Departments and Office of Diversity and Equity.
3. **Complaint Resolution and Inequities** including disparities in reporting, acting upon and resolving complaints involving protected classes of employees and actions/experiences inconsistent with a work culture of safety, trust and belonging.
4. **Workforce Equity Strategic Plan Implementation** focusing on recommendations of policies and practices to advance the principles and actions required to achieve goals outlined in the Plan.

Each work group was assigned a process facilitator from the consultant team to assist in organizing the work. Work groups often worked quite autonomously of consultants, who often actively advocated for their groups in JRG team meetings.

Consultant Recommendations

Introduction

It is important to note at the outset that Multnomah County (County) is a national leader with respect to workforce equity. The County is looked to for progressive leadership concerning government structures, policies and practices that advance workforce diversity and equity.

Results from the County HR Trends Report FY 2015-2016[2] (HR Report) indicate that as a percentage of new hires the County workforce is becoming more diverse, 32% of new hires represent employees of color compared to the existing percentage of 27%. The HR Report also shows that employees of color (EOC) represent a higher percentage of overall promotions than the current workforce, 34% to 27%. Lastly, the County's executive leadership is one of the most diverse in the country.

The HR Report also identifies workforce challenges, especially with respect to early terminations. While acknowledging advances made by the County, Consultant Recommendations (hereinafter referred to as "recommendations") identify areas for improvement and growth and provide strategies, policies, practices and structures that incorporate principles of targeted universalism and Equity 2.0.

Targeted universalism requires targeted strategies for different groups. This does not mean that more marginal or underrepresented groups are not the focus, but such focus is not exclusive and is part of a larger goal of getting all groups to the universal goals and fully belonging. For the County, this means partnering with, serving and supporting all groups via an overall justice-based frame, while providing a specific focus on racial equity.[3]

Many organizations, when they focus on equity without a targeted universalism frame, assume the goal is to eliminate disparities between groups. While we support efforts to eliminate disparities, such a perspective is too limited and can be divisive. When there is a goal that is set not according to what the more favored group has, but pursuant to a value that is shared by the County, then obtaining that goal will eliminate the disparities while paying attention to where all groups are situated, including the more favored group.

The recommendations that follow address structural, cultural and interpersonal issues. While these issues are interrelated, we believe it is important to distinguish between them. Much of the focus of our recommendations targets the first two areas. While structural strategies are crucial, they do not suffice in terms of overall institutional change. They must be done in tandem with organizational cultural and interpersonal strategies towards equity broadly, and racial equity specifically.

When analyzing structures and their impact on equity, the focus is often on identifying and removing structural barriers. While this is appropriate, and we support removing barriers, it is too limited. Structures do

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[2] HR Trends Report, Uneven Rates of Probationary Terminations, https://public.tableau.com/profile/jillian.girard#!/vizhome/SeparationsReport/SeparationsStory

[3] Equity and Empowerment Lens, Multnomah Workforce Equity Report, Multnomah County Office of Diversity & Equity, revised March 24, 2014.

not just impede, they also enhance and enable. For this reason, it is important to develop structures that affirmatively promote the outcomes that the County is seeking.

Developing structures that promote desired outcomes is one of the ways that targeted universalism can sharpen the work at the County. To achieve this goal, where appropriate, the County should develop and be explicit about the goals being pursued.

The work of integrating racial equity and belonging with workforce equity is a transformational process that is going to require additional investment, as well as creatively organizing and prioritizing current efforts.

The recommendations address structural, cultural and interpersonal adjustments that balance power and further define responsibilities and accountability within the County. The recommendations are guided by targeted universalism in that they address disparate outcomes based on race[4] while advancing the stated goals of inclusiveness and belonging.

Conceptual Framework for 4 Key Impact Areas

1. **Multnomah County Workforce Equity Strategic Plan (WESP)**

The WESP provides the blueprint for implementing policies, practices and realignment of responsibilities that focus on achieving racial equity.[5] In the preamble to the WESP, Multnomah County Commission Chair, Deborah Kafoury states, "This Workforce Equity Strategic Plan represents a baseline and starting point for our organization."[6]It is evident from language in the WESP,[7] stakeholder interviews and discussions with the Advisory Council that the WESP is a milestone on the pathway to creating a workplace that supports an environment of safety, trust and belonging. The WESP also establishes initial mechanisms for accountability, tracking and oversight.

2. **WESP Committee (Committee)**

The WESP provides the Committee with important oversight, feedback and reporting responsibilities.[8]

The Committee should be structured as an independent, diverse, inclusive, objective and transparent arbitrator of the implementation of the WESP. It should be responsible for the accomplishment of performance measures, tracking workforce equity outcomes and advising to the Commission.

The Committee also provides an excellent opportunity for the County to actualize the interdependence of the County and community[9] by including community stakeholders on the Committee, and by providing a forum for community input and communication.

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[4] HR Trends Report
[5] Multnomah County Workforce Equity Strategic Plan, Introduction, "Why We Lead With Race," page 4.
[6] Ibid., Letter from Chair Deborah Kafoury, page 1.
[7] Ibid., Introduction, page 4.
[8] Ibid., Accountability, Updates and Reporting, page 18.
[9] Ibid., Introduction, page 3.

For diverse groups to work well there must be some shared values and shared goals. These goals and values are not always a given and need to be established and periodically re-established.

Oversight, monitoring and accountability are important components of any strategic plan. The role of the Committee in helping structure and manage accountability is an important factor in ensuring that County practices, policies and actions align with the principles of racial equity and targeted universalism.

3.   Office of Diversity and Equity (ODE)

ODE is the manifestation of the County's effort to uplift the importance of diversity and equity. ODE is charged with the responsibility to coordinate programs that address improving workforce equity, and to specifically initiate and support strategies that improve and promote racial equity.

ODE was a critical partner with Employee Resource Groups (ERGs), other internal stakeholders and the community in development of the WESP, and was responsible for managing the planning process. ODE also has a key role in tracking compliance with minimum performance measures and partnering with ERGs and other organizational stakeholders to develop updated strategies to further improve workforce equity.[10]

Just as responsibility and accountability for countywide health outcomes resides with the Health Department, responsibility and accountability for achieving racial equity appropriately resides with ODE. For this reason, many of the recommendations address the scope of authority and power of ODE.

4.   Human Resources (HR) and County Leadership[11]

Most of the critical pathways toward workforce equity intersect with the roles and responsibilities of HR (both Central and Departmental HR) and County Leadership, including the areas of recruitment, hiring, learning and development, evaluation, promotion, retention and termination.

Personnel in positions of authority possess spoken and unspoken influence and power over how resources flow, and how cultural norms are set, experienced and rewarded, and what and how decisions get made, and for whom. County leadership plays a crucial role in advancing and protecting social justice, racial equity and belonging-based work.

The actions and practices of HR and County Leadership play a major role in creating organizational culture and reducing workforce disparities and promoting affirmative equity outcomes.

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[10] Ibid., ERGs Letter, page 2, Introduction, page 8, Updates and Reporting, page 18.
[11] County Leadership for purposes of this report is all department managers, department directors and administrative executives.

Summary of Key Recommendations

Workforce Equity Strategic Plan

The WESP provides the foundation upon which to strengthen County structures, systems and practices to: 1) enhance the authority and scope of responsibilities of ODE, 2) enhance WESP performance standards and measures, 3) institute practices and policies that reduce barriers and promote efforts for equitable and inclusive recruitment, hiring, learning and development, promotion and retention, and 4) build in more accountability and oversight.[12]

The importance of a workforce equity plan that incentivizes staff and holds leadership accountable for desired outcomes cannot be understated. Research indicates that diverse workforces and institutions that create an environment of belonging are more productive and have higher retention rates.[13]

Consultants recommend the following specific amendments to the WESP:

- Empower ODE as an equal partner with Human Resources and County Leadership to ensure equitable and inclusive practices with respect to workforce recruitment, hiring, learning and development, promotion, retention and termination, especially as those practices and structures impact employees of color.

- Provide for greater responsibility and expectations of County Leadership to ensure equitable workforce outcomes.

- Further delineate and expand the powers and authority of the WESP Advisory Committee to ensure requisite oversight, feedback and accountability of WESP implementation and compliance with WESP performance measures.

- Clearly state the County's overall desired outcomes and goals.

To implement the WESP, the ODE Director (Director), an important factor for success, will:

- Ensure that all consultant recommendations, WESP performance measures and accountability standards are moving forward within stated timelines.

- Coordinate meetings of the Committee and serve as staff liaison to the Committee.

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[12] Dr. Vanessa Weaver, "Diversity Primer, "Diversity Best Practices," September 2009, Chapter Five, "Diversity & Inclusion Leadership," Alignment Strategies, https://www.diversitybestpractices.com/sites/diversitybestpractices.com/files/import/embedded/anchors/files/diversity_primer_chapter_05.pdf

[13] James Dennin, "Corporate Diversity Programs Don't Work and a New Study Shows Why," Mic, August 19, 2016, https://www.businessinsider.com/corporate-diversity-programs-dont-work-and-a-new-study-shows-why-2016-8; Vivian Hunt, Dennis Layton and Sara Prince, "Why Diversity Matters," McKinsey & Co., January 2015; Peter Dizikes, "Study: Workplace Diversity Can Help the Bottom Line," MIT News Office, October 7, 2014.

- Collaborate with internal stakeholders and appropriate external agencies and organizations to inform best practices in achieving racial equity.

- Align implementation plans and efforts between Departments to ensure uniform minimum performance standards are achieved.

- Regularly communicate with the Commission Chair regarding accomplishment of WESP performance measures and achievement of intended outcomes with respect to racial equity and inclusion.

WESP Committee (Committee)

Strategic plans that do not adequately provide for accountability and oversight omit an important component for ensuring successful outcomes. One strategy to evidence a change of culture toward equity and inclusion is to provide for an accountability and oversight structure that is diverse, open, transparent and inclusive.

Empowerment of the Committee provides an opportunity to clearly communicate that County Leadership is open to being held accountable for changing County culture regarding racial equity and creating an environment of safety, trust and belonging.

For the WESP to be successful, appropriate higher authority should:

- Designate and empower the Committee with responsibility for monitoring, oversight and accountability for implementation of the WESP, accomplishment of minimum performance measures and reporting to the Commission.

- Ensure community participation on the Committee and include as part of the Committee charter community outreach, communication and engagement.

With that foundation laid, consultants recommend:

- The Committee be sponsored by the Chair and convened by ODE.

- Committee membership to include internal and external stakeholders, frontline and managerial staff and representation from Employee Resource Groups.

- Departmental WESP implementation plans to be submitted to the WESP Committee for review and feedback.
  - Best practices, as determined by ODE and the WESP Committee, should be uplifted and enforced County wide.
  - Based on review of departmental outcomes, the Committee to recommend minimum performance standards with respect to racial equity and inclusion.
  - Disparate implementation can contribute to uneven implementation and outcomes.

- Semi-annual workforce equity and WESP implementation briefings, presented to the Chair by the WESP Committee in collaboration with ODE.

o Semi-annual Committee presentations communicates the importance and urgency of workforce equity implementation and progress.

o The Committee will report on Departmental compliance with WESP.

- The Committee will develop and add to the WESP a glossary of terms and definitions that create a shared language around Equity 2.0, cultural responsiveness, targeted universalism, racial equity and belonging among other terms to be determined.

  o Initiate conversations and discussions where different groups can talk about and explore key terms and how those terms impact their work, County culture and themselves.

Office of Diversity and Equity (ODE)

Pursuant to the WESP, County Code[14] and practice, ODE is charged with the responsibility of shepherding the County's efforts to realize racial equity and inclusion and provide for safe spaces for all employees.

The challenge is that neither the County Code nor the WESP provide specific authority for ODE to enforce racially equitable practices or hold County leadership accountable for removing barriers and proactively pursuing goals of inclusion and belonging.

Governments and corporations[15] throughout the nation establish an Office of Diversity and Equity, or a similar unit, with the intent to have dedicated staff with requisite expertise and background to provide leadership and oversight for racially equitable policies and practices, and to hold institutions accountable for desired outcomes. Too often institutional intent is not coupled with the necessary authority, power and resources to implement and enforce strategies, policies and practices that change organizational culture.[16]

To attain diversity, equity and inclusion, best practices suggest the need for a designated leadership position and a department that has the power, authority and resources to implement and enforce strategies, policies and practices that reduce racial disparities and barriers to equity and inclusion for all underrepresented groups.

Institutions need to have a designated position and preferably a department that can be held accountable for measuring and monitoring performance and that has the power and authority to hold the institution accountable for implementation and outcomes.[17] Accountability is often cited as a key component to successful diversity and inclusion programs.[18]

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[14] Multnomah County Code, Section 25.120, Duties

[15] Michael Bush & Kim Peters, How the Best Companies Do Diversity Right, Fortune Magazine, December 5, 2016, http://fortune.com/2016/12/05/diversity-inclusion-workplaces/

[16] Tessa L. Dover, Cheryl R. Kaiser and Brenda Major, "Diversity Policies Don't Help Women or Minorities, and They Make White Men Feel Threatened," Harvard Business Review, https://www.huffingtonpost.com/entry/diversity-programs-are-failing-minorities-heres-a-better-way_us_568c119be4b014efe0dbeb8a

[17] Natalie Holder-Winfield, *Recruiting & Retaining a Diverse Workforce*, San Francisco: First Books, 2008.

[18] Janessa Lantz, "Diversity Programs Are Not Created Equal," March 4, 2017, https://thinkgrowth.org/diversity-programs-are-not-created-equal-7e4bbedeb9ee

In viewing ODE in relation to the organizational hierarchy, consultants recommend that the County:

- Charge the Director of ODE (Director) with monitoring implementation of the WESP; ensuring compliance with performance measures; and enforcing strategies, policies and practices that reduce racial disparities, and create safe environments and a pathway for growth and belonging for all employees, with special attention to underrepresented groups.

    o Primary responsibility for implementation, monitoring and accountability of the WESP should reside within a department, agency or unit- specifically ODE- so that a department level Director can be held accountable for County goals and outcomes relative to WESP.

- Provide structural and policy directives that align the Director as an equal partner with HR and Department Directors with respect to implementation of the WESP, elimination of racial and other disparities in recruitment, hiring, promotion, retention and termination, and the creation of a work environment that supports safety, trust and belonging.

    o Failure to implement structural equity not only creates misalignment, it can send the message that the County does not see the mission and work of ODE as essential. While we focus on ODE, as recommended throughout the Report, all Departments should be evaluated for alignment with the goal of racial equity and the broader universal goals that create belonging for all.

HR and County Leadership[19]

Organizational cultures rarely change without support and leadership from the governing board and senior management. County Leadership must set the example and re-enforce the message that diversity, racial equity, inclusion and creating an environment of safety, trust and belonging are foundational values for the County.

Issues of race continue to be salient and important issues in America, and strategies to constructively address such issues can not only raise critical legal issues, but also issues of conflict and distrust. Research shows that members of high-status groups, such as whites, may perceive pro-diversity messages from organizations as threatening to their group's status.[20] There should be deliberate practices to hear these and other concerns and to make it clear that belonging and targeted universalism is for all and not zero sum. There is a balance, and while there needs to be explicit and extra focus on underrepresented groups, such focus is not exclusive. Practices and communication should be reflective of this balance.

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[19] County Leadership for purposes of this report is all department managers, department directors and administrative executives.
[20] Tessa L. Dover, Brenda Major, Cheryl R. Kaiser, "Members of High-Status Groups Are Threatened by Pro-Diversity Messages," Journal of Experimental Social Psychology, Volume 62, January 2016, https://www.sciencedirect.com/science/article/pii/S0022103115300068

Exposure to diverse groups has been found to be key to achieving workforce equity.[21] In analyzing data from companies and interviews with managers and executives, Frank Dobbin and Alexandra Kalev found that, "… companies get better results when they ease up on the control tactics. It's more effective to engage managers in solving the problem, increase their on-the-job contact with female and minority workers, and promote social accountability—the desire to look fair-minded. That's why interventions such as targeted college recruitment, mentoring programs, self-managed teams, and task forces have boosted diversity in businesses. Some of the most effective solutions aren't even designed with diversity in mind."[22]

Thus, County Leadership should create spaces where these issues can be explored both from a technical as well as a cultural and interpersonal perspective, based on voluntary self-selection. For example, some companies have developed formal and informal networks where employees can voluntarily share a meal or other activity and discuss cultural and interpersonal issues without the pressure of work bureaucracy and hierarchy. Additionally, the County will further benefit from further defining and expanding the expectations and responsibilities of Department Directors, Managers and Human Resource Personnel to develop and implement strategies, practices, policies and operations that increase diversity, eliminate racial disparities in employment and promote and create an environment of inclusion and belonging.

Both County Leadership and HR play important roles in creating a sense of belonging by establishing policies, practices and systems, and by making investments that support racial equity and promote inclusion and belonging. They are the primary implementers and translators of targeted universalism and should hold and enact a vision that sees belonging and inclusion in not just the representation of more diverse individuals, but also the best structures and culture to ground and sustain targeted universalism.

Lastly, the County acknowledges that the complaints process has become an indicator of many of the problems with achieving a fair and just workplace free from fear, trauma and retaliation. Consultants address the restructuring of the complaints process in the final section below.

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[21] Lantz.
[22] Frank Dobbin and Alexandra Kalev, "Why Diversity Programs Fail," https://hbr.org/2016/07/why-diversity-programs-fail

Implementation and Timelines

All recommendations that follow are proposed amendments to the WESP and are intended to augment and provide additional clarity and specificity to WESP strategies, practices, policies and measures that support and promote racial equity and inclusion.

Consultants recommend that there be one plan/document/place/source that holds all the recommendations, standards, performance measures, concepts, principles, goals and objectives, as well as all activities, actions, strategies, measurement systems and accountability structures for achieving racial equity and a culture of belonging. The plan must include projected timelines based on importance and capacity, and pro forma budget necessary to implement the plan. Internal and external stakeholders should be able to go to one source to understand the County's plan to achieve racial equity and create a culture of belonging.

Next steps will require sorting through these recommendations, aligning with current efforts, identifying and solidifying resources, strategizing with a racial equity lens, and mobilizing key stakeholders internally and externally.

Some of our recommendations are structural in nature, and as the structure of the County is changed and amended, it will be important to review the changes to make certain that staffing and resources under any new structure are appropriate.

It is also important to note that structural, cultural and interpersonal change and realignment is a process that does not happen overnight. Change takes time, patience, learning and persistence.

Office of Diversity and Equity

Expanding ODE's Role to Implement the Amended WESP

Hiring and Recruitment

- Review all hiring decisions for exempt positions to ensure an equitable and inclusive selection process. This includes an equity review that looks at the demographic data of all applicants against the final applicant pool to test for an inclusive selection process. A representative from ODE will be included on the interview panel for the final applicant pool. Implementation by December 2020.
  - ODE should not have the power to reject a departmental hiring decision, but ODE comments, questions, opinions and analysis should be part of the review process and be part of the departmental personnel record.

- In partnership with HR and the Committee, develop an interview tool to assess changes over time in:
  - understanding of intercultural relationship building with diverse employees.
  - bridging differences among diverse employees.

- o providing culturally responsive service delivery,

- o improving relationships with communities of color, immigrants, and refugees,

- o integrating equity-based concepts and practices into programming and decision-making, with attention to racial equity.

Implementation by July 2020

Advancement, Learning and Development

- Review all promotion decisions for exempt positions to ensure an equitable and inclusive selection process. This includes an equity review that looks at the demographic data of all applicants against the final applicant pool, and inclusion of an ODE representative on the interview panel for the final applicant pool. Implementation by July 2020.
  - o ODE should not have the power to reject a departmental decision, but ODE comments, questions, opinions and analysis should be part of the review and appeals process and be part of the departmental record.

- Develop a comprehensive Equity Toolkit[23] for use by Departmental Diversity and Equity Teams to facilitate efforts to implement targeted universalism and create environments of safety, trust and belonging. Such toolkits, accompanied by strategic educational sessions and conversations, facilitate sharing by departments of uniform definitions and practices around equity. Implementation by September 2019.

Retention and Separations

- In collaboration with Department Management, HR and County Leadership, conduct prior review of all involuntary terminations. Implementation by July 2019.
  - o ODE should not have the power to reject a departmental decision, but ODE comments, questions, opinions and analysis should be part of the review and appeals process and be part of the departmental record.
  - o ODE to conduct prior review of all probationary terminations, with special attention to African Americans.[24] Develop data on actions and practices that reduce racial disparities.

- Conduct exit interviews with all voluntary terminations of exempt employees of color. Implementation by July 2021.
  - o ODE to apply a racial equity and social justice lens to current exit interview questions, processes, training of interviewers, and how exit interview information is used to inform subsequent planning and decision-making.

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[23] Government Alliance on Race and Equity, "Racial Equity Toolkit," https://racialequityalliance.org/wpcontent/uploads/2015/10/GARE-Racial_Equity_Toolkit.pdf
[24] HR Trends Report.

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- Conduct exit interviews with at least 50% of involuntary terminations of employees of color. Implementation by 2019.

- Conduct exit interviews with all involuntary terminated employees of color. Implementation by September 2020.
  - Such information shall be shared with HR and Evaluation & Research to inform changes in organizational culture.

Accountability and Measurement

- In collaboration with HR, County Leadership and other appropriate County partners, develop evaluation metrics that are informed by HR Trends Report and Employee Survey data and other objective criteria. Clearly defined and communicated metrics support an environment of social accountability. Implementation by March 2021. The accountability system may include:
  - If a department is outside of an agreed upon threshold or performance measure, then there may be closer review and suggested corrective actions.
  - If a department continues to underperform, especially with respect to underrepresented or marginal groups, ODE may engage in a deeper examination and provide additional recommendations.
  - The concept of social accountability includes recognition of positive performance. There should also be a positive focus with support and acknowledgement for departments, groups and individuals that affirmatively move the County toward stated goals.

Capacity and Resources

- Develop a three-year budget to meet the ODE's responsibilities and obligations under the amended WESP. The budget will include funding for the following new staff positions within ODE. Completion by July 2019.
  - Project Manager – directly responsible for ensuring that all WESP and HR recommendations are moving forward within targeted timelines.
    - The rationale for placing the Project Manager within ODE is that ODE should ultimately be responsible and held accountable for WESP implementation
  - Disabilities Support Specialist - responsible for identifying, implementing and managing strategies to create an environment of safety, trust and belonging for employees with disabilities. ODE to work with the Employee Resource Group, Including Disability in Equity and Access (IDEA) and incorporate findings from the Research on Equity and Disability in developing the responsibilities and scope of the position.
    - The Specialist shall be responsible for multiple functions, including assisting with access and accommodations, and being a resource for purchasing and recruitment.
    - The Specialist also collaborates with appropriate internal and external groups, such as IDEA and the Invisible Disabilities Association (IDA), to stay abreast of field developments and ensure the County remains at the forefront of the equity movement.

- Clarify and specify responsibilities and duties of the ODE Civil Rights Officer.

- Clarify and specify roles, responsibilities and duties for each position within ODE.

Implications for HR and County Leadership[25]

Strengthening the Capacity of County Leadership

Training, Learning and Development

- Provide County Leadership with eight hours per year of training, learning and development that improve management competencies and willingness to understand and communicate concepts of belonging and intercultural communication, and support practices that promote fairness, equity and inclusion, with a special focus on improving outcomes for constituencies that the County HR Trends Report shows have been disadvantaged and/or practices that result in disparate outcomes. Implementation by December 2019.
    - Training that emphasizes the crucial role that managers play and the importance of their ability to integrate a social justice, racial equity and belonging-based lens.
    - The County should endeavor to reduce the perception that this standard is all about diversity training. Studies have shown that diversity training requirements "… can activate bias rather than stamp it out. As social scientists have found, people often rebel against rules to assert their autonomy."[26]
    - Key to this standard is including components of belonging so that employees understand the value of the training, learning and development-based culture and practices, and that all employees benefit from an organizational culture that values safety, trust and belonging, and is diverse, equitable and inclusive.
    - Training, learning, development and orientation include a focus on cultural responsivity, multicultural proficiency, implicit bias, trauma and healing.
    - There should also be space for departments and units to experiment and innovate with techniques, strategies, programs and practices in obtaining the stated goals. This is a way to foster input, creativity and buy-in.

- Design, in collaboration with HR, a leadership development model that aligns with 70/20/10 learning philosophies;[27] the model should focus on leading with equity, and desired outcomes should link back to this focus. The model requires more than just diverse leaders but also leaders who can promote and support diversity.
    - Promote self-organizing among staff and managers, support peer-to-peer learning and the sharing power, and share skillsets that promote experiential learning among colleagues.

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[25] County Leadership for purposes of this report is defined as all department managers, department directors and administrative executives.
[26] Dobbin and Kalev.
[27] Center for Creative Leadership, "The 70 Rule for Leadership Development," https://www.ccl.org/articles/leading-effectively-articles/70-20-10-rule/ (accessed August 15, 2018).

o Create a culture of ongoing personal and professional development – learning to lead with inclusion is an ongoing journey.

o Identify areas of concern where County policies go unenforced or where resistance is documented that operates against policy and practice guidelines; implement a transparent process of building bridges to engage individuals or groups that are identified as resistant to or obstructive of equity and inclusion policies.

Developments that Contribute to Successful Outcomes

Engagement and Structured Self-Selection

- Provide coaching and peer-to-peer engagement opportunities for upper management and other exempt positions, employees to work with others in and outside the County.
  - o When managers voluntarily and actively help boost diversity and equity in their companies, they begin to think of themselves as diversity champions.[28]
    - ▪ For example, when invited to support college recruitment programs targeting minorities, managers willingly participate.

- Support conditions and culture in which all groups can thrive and have a sense of belonging. Creating opportunities for continued engagement is important. There are several ways this could be promoted:
  - o Brown bag lunches where there is a chance to focus on what diverse groups bring to the County.
  - o Visioning for a future where belonging is real.
  - o Cross group networking with activities lead by different group members. The objective is to get input from the group while looking at difficulties focusing on the positive and aspirations.

Contact-Exposure

- Look for additional opportunities to increase voluntary or self-selected contact between diverse groups, but the contact must be structured to produce positive outcome.[29]
  - o Working together toward a common goal, e.g. the Advisory Council where diverse individuals and groups meet to evaluate management, structural impediments, complaints and the WESP with the frame of improving racial equity and creating an environment of belonging.
  - o Cross-training practices allow for employees to interact with new people, learn new skills and deepen their understanding of the County and its efforts to create belonging.

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[28] Dobbin and Kalev.
[29] Thomas Pettigrew and Linda Tropp, "When Groups Meet-The Dynamics of Intergroup Contact," Psychology Press, 2011.

Social Accountability

- Evaluate all County Departments and units not only based on eliminating barriers and disparities, but also according to pro-active actions, strategies and policies that bridge and advance overarching County goals and outcomes.
- Share and examine best practices outside the County with respect to implementation of proactive efforts and activities.
- Lift and support efforts, practices and policies that move the County toward safety, trust and belonging. A sampling of strategies includes:
  o Targeting feeder schools for prospective hires.
  o Continuing and strengthening internships programming designed for underrepresented groups to be employed and to find out more about the County opportunities, as well as the County learning more about underrepresented and marginal groups (e.g. College to County Mentoring Program).
  o Partnership with various communities and schools to identify existing and emerging opportunities. For example, converting Department of Community Justice space for community use (e.g. converting parking area for youth basketball[30]), or convening small groups of adult probationers, probation officers and restorative justice advocates around common issues and concerns.
- Help managers and other supervisory personnel engage in empathic listening and practices that are culturally responsive and ensure that all members have space and support to contribute and co-create.
- Develop mechanisms and systems that are transparent about WESP compliance and performance, including:
  o Report progress in supervision of employees and managing implementation of equity and inclusion practices.
  o Communication of compliance and performance to the Commission.
  o Share performance results and problem solving at Department Directors meeting with the COO.
  o Develop a leadership scorecard that is reviewed quarterly (and ongoing development is flexed based on scorecard).
  o County Leadership must be a primary partner in the design and content of social accountability standards.
  o Develop a toolkit of assessment tools to improve self-awareness and increase employee voice.
- Incorporate a continuous improvement accountability model that designs metrics, tests metrics, then learns and redesigns.

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[30] Studio Gang, "Polis Station," Fast Company, October 2018, page 46.

Workforce Equity

- Assign all Departments an Equity and Diversity (E&D) team consisting of stakeholders from diverse backgrounds and that represents front line staff, managers, supervisors and senior leadership. This recommendation is an existing WESP Performance Measure. Implementation by July 2019.
    - The department Equity Manager will facilitate and coordinate the work of the E&D teams, if the department has an Equity Manager.
    - In structuring and forming the equity teams, it is important to note that "The best workplaces forge bonds among co-workers of different political views, different backgrounds, different job titles."[31] Different backgrounds would include employees with different ethnic origins and sexual orientation. Such teams provide hands on developmental experience with inter-racial communication, political understanding, and increased sense of belonging.
    - Continued engagement and accountability are key.[32]

- All Departmental E&D teams in partnership with the Equity Manager (if the department has an Equity Manager) will have developed a departmental Workforce Equity Plan (Equity Plan) that details how the team and the rest of the department will improve racial equity and inclusion and create a sense of belonging within the department, and states agreed upon Plan outcomes. The WESP provides a template for developing a Plan. Implementation by July 2020. The Plan should address:

    - Creating a safe space where employees feel fairly and equitably treated with a sense of belonging should be the expected Plan outcome.
    - Include accountability mechanisms and standards for reporting progress in supervision of employees and managing implementation of equity and inclusion practices and policies.
    - Plan development will include assessment of what departments are already doing in key goal areas that is working and building in flexibility around achieving goals, while maintaining a highly visible priority placed on goal attainment and completion.

- Design a process where all Departments report to the COO on equity and inclusion outcomes and Department trends, including Department-specific data in the countywide employee survey and the HR Trends Report. Implementation by July 2021.

- Establish diverse interview panels in all Departments. Implementation by December 2020.
    - Diverse panels will include, if possible, representatives from frontline staff, managers, senior leadership and members from underrepresented groups of employees.

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[31] Michael Bush & Kim Peters, How the Best Companies Do Diversity Right, Fortune Magazine, December 5, 2016, http://fortune.com/2016/12/05/diversity-inclusion-workplaces/
[32] Carolyn Brinkworth, Kristen Luna Aponte, Allison-Scott Pruitt, Joshua Young, Five Things We Learned About Creating a Successful Workplace Diversity Program, Harvard Business Review, March 30, 2018, https://hbr.org/2018/03/5-things-we-learned-about-creating-a-successful-workplace-diversity-program

o Departments in partnership with HR will ensure that panelists receive training essential to interview skills and an understanding of WESP goals and expected outcomes.

- All Departments (with an Equity Manager) will establish clearly defined and standardized roles and responsibilities for the Department Equity Manager that acknowledges their expertise and specialization with principles of equity and inclusion, and charges them to hold the Department accountable for departmental Equity Plan outcomes. Implementation by July 2019.

- Task all Departments to clearly define the responsibilities of each Department HR Manager as that position relates to and impacts departmental goals for equity, inclusion and belonging. Implementation by July 2019.

- In partnership with ODE, distinguish and eliminate duplication and overlap of roles and responsibilities between ODE, Central HR, Departmental HR, Department Equity Managers and Department Directors. Implementation by December 2020.

- Agree on minimum standards and performance measures for County Departments and units, and allow for waivers based on special circumstances. Implementation by December 2020.

Human Resources

Hiring and Recruitment

- Develop, in partnership with ODE, a talent acquisition, orientation and onboarding model for exempt employees that includes a focus on principles of racial equity and inclusion and a basic understanding of targeted universalism. Implementation by December 2020.
    o Establish pathways to employment that offer pre-service orientation to work within County government.
    o Create clear guidelines that are shared during onboarding that have specific expectations about leading a team (focus on emotional intelligence, equity lens, and creating an inclusive environment).
    o Develop and implement employment interview techniques that are inclusive of diverse cultural norms and mitigate the effects of implicit bias.

- Conduct, with support from ODE, a disparate impact analysis for every hire utilizing the Workday platform. Implementation by July 2019.

- Review, revise and implement employment policies with an equity and inclusion lens. Implementation by September 2020.
    o Assure equity and inclusion policies and practices are included in application, recruitment, hiring panels and onboarding experiences.

- Develop, in partnership with ODE, a talent acquisition model that prioritizes leading with equity and inclusion. Implementation by July 2021.

Advancement and Development
- Develop, in partnership with ODE, racial equity tools that managers and supervisors can use to create and support work environments that are equitable, inclusive and fair. Implementation by September 2020.
  - Create a culture of ongoing learning and development – learning to lead with inclusion.
  - Classify managers and supervisors as a defined population in the County workforce (n=400) and provide incumbents as well as new hires with specific tools and opportunities that focus on their capacity to lead, manage within, and sustain an established culture of safety, trust and belonging.
  - Expand management and supervision personnel position descriptions to include coaching and a joint commitment to achieve growth between themselves and their direct reports.

- Develop a review and oversight process to ensure that promotions are equitable and inclusive and that announcements, interview questions, qualification standards and applicant pools reflect best practices of equity and inclusion. Implementation by December 2020.

- Develop a plan for building bridges and accountability standards for individuals, groups and departments that exhibit resistance to change regarding policies, practices and systems that advance racial equity and inclusion. Implementation by July 2021.

Retention and Separation
- Develop a comprehensive Employee Retention Plan for the County. Implementation by December 2020.
  - All managers document in Workday steps taken to retain employees, especially employees from underrepresented groups.
  - Design retention programs for all employees, with attention to employees of color, that support access to work and experiences that enhance their preparedness for advancement and promotion.

- Identify policies, practices and procedures that address managing employees that refuse to accept, implement and comply with the County's stated goals around belonging. Implementation by December 2020.

Tracking, Monitoring, Communications and Policies
- Continue tracking diversity and equity outcomes by conducting surveys and tracking data. Continue to track data produced in the HR Trends Report and countywide employee survey.
  - The HR Trends Report and employee surveys to be informed by inputs and feedback from ODE, the Committee and County Departments.

- Identify systems and vehicles to track employee feelings of belonging. Implementation by December 2020.
    - o Conduct a Belonging Survey every two years.

- Create, in collaboration with County Leadership, a multi-dimensional communication strategy and plan that informs and educates employees about the value of safety, trust and belonging and the principles of targeted universalism. Implementation by December 2021.
    - o Substantial progress concerning communication of belonging has been achieved in Canada.[33]
    - o Promote cultural responsiveness and respect in county-driven media, yielding enhanced and new relationships with community partners and other external stakeholders as the County makes strides in equity and inclusion.
    - o Achieve buy-in and behavioral change through a long-term communication strategy that identifies the various audiences and caters the communication approach to "why does this matter to me?" Create a "WIFM" (What's In It For Me) roadmap for each impacted audience.
    - o Research current modes of communication: what is working, who is reading/accessing the communication, and how is it shifting behavior?
    - o Do a gap analysis about current communication modes and mission communication modes (i.e., we are very email heavy for communication and this is not the most effective way to shift a culture).
    - o Research communication best practices for large-scale change initiatives in other large organizations.
    - o Identify metrics and benchmarks to track success of communication strategy.

Complaints Process

"Among the nearly 90,000 discrimination complaints made to the Equal Employment Opportunity Commission in 2015, 45% included a charge of retaliation—which suggests that the original report was met with ridicule, demotion, or worse. Once people see that a grievance system isn't warding off bad behavior in their organization, they may become less likely to speak up. Indeed, employee surveys show that most people don't report discrimination. This leads to another unintended consequence: Managers who receive few complaints conclude that their firms don't have a problem."[34] Failure of the grievance system can also lead to voluntary terminations by those impacted.

- Establish a centralized independent unit under the COO, as a non-departmental "agency," staffed by a diverse set of skilled investigators charged with investigating employee complaints from underrepresented groups. Implementation by September 2019.

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[33] "Belonging the Paradox of Citizenship", Adrienne Clarkson, 2014.
[34] Dobbin and Kalev.

- o Unit to report to COO key themes and lessons learned to inform strategies that create safety, trust and belonging.
- o Conduct a baseline analysis on the current complaints processes and system lifting up 1) strengths and what is working well according to equity and racial equity specifically, and 2) recurring and emerging structural issues contributing to, perpetuating or exacerbating racial exclusion and inequity in the workforce.
- o HR in partnership with ODE to evaluate ways to enhance the complaints resolution process to include an equity and inclusion lens, and an evaluation component to assess improvements in the resolution process.
- o Members of underrepresented populations will be recruited, trained and encouraged to serve on the centralized unit.
- o The diverse group of individuals eligible to serve on the centralized unit will also possess an equally diverse skillset and professional experience.
    - Important skills and personal attributes include active listening, ability to adhere to meeting protocols, demonstration of emotional intelligence, understanding of implicit bias and the ability to minimize its display, etc.
    - Other considerations include cultural competencies such as respect for cultural differences, cultural humility, and knowledge of laws and regulations that govern fair employment.

- Obtain legal guidance and identify best practices on how to improve complaints rules, analyses and procedures that center on complex situations and experiences. Implementation by December 2019. Practices such as (but not limited to):

    - o How to work with actors in one complaint from multiple racial and other underrepresented groups of employees, addressing the role of both the complainant(s) and the subject(s) of the complaint.
    - o Clearly identify barriers to an efficient and equitable complaints process, including but not limited to retaliation.
    - o The process should be streamlined so that it does not create bottlenecks or overload certain staff.

- Develop and train managers and supervisors on the new complaints system with focus on specific objectives and measurable outcomes. Implementation by July 2020. Training and education to best:
    - o Emphasize the role of leadership.
    - o Conduct respectful processes.
    - o Implement appropriate consequences.
    - o Identify mitigate potential barriers to such processes.

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- Educate and inform all staff on the intent and use of the new complaints system. Implementation by September 2020.

- Identify an appellate body to conduct appeals by reviewing cases that appear unsubstantiated and/or do not have enough evidence of discrimination. Implementation by December 2019.
    - Review occurs only upon request for an appeal, and appellate body reviews documents and the process to gauge if the investigator adequately, appropriately and equitably performed the investigation, and determines whether the evidence supports the conclusion that the investigator put forward.
    - Appellate body can either affirm the original decision or remand it back to the investigator team.[35]

- Design an evaluation component for complaints process. Implementation by July 2020.
    - Collect recent baseline data against which to measure progress and inform potential future enhancements to this ongoing work.
    - Capture and analyze data over three years that evaluate trends within departments, divisions and work units with the number and type of complaints and assesses the experience of employees across the organization related to complaints.

- Assign a group of internal stakeholders to review complaints findings, decisions and discipline. This group should comprise ODE, County Counsel, Labor Relations, Department HR, Department Director and COO. Implementation by December 2020.

- Conduct focus groups and assessments to gauge the climate of the staff concerning changes to the complaint process. Implementation by December 2021.

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[35] 8/10/18 Conversation with Erin McEntire, Strategic Advisor, City of Seattle Office of Civil Rights. Appellate body in City of Seattle is the Seattle Human Rights Commission.

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Summary and Next Steps:

While this document marks the end of a process to gather recommendations and build cohesion to fulfill its purposes and goal, it also represents a beginning in Multnomah County's efforts to create safety, trust and belonging for every employee.

Next steps will require sorting through these recommendations, aligning with current efforts, identifying and solidifying resources, strategizing with a racial equity lens, and mobilizing key stakeholders internally and externally.

A project of this magnitude and report that brings together so many bold ideas ultimately depends on the commitments of individuals organized into effective teams to move the work forward. Given the desire and commitment of a critical mass of stakeholders, the ultimate impact of this work will be achieved.

Ultimate Impact:

Equity and inclusion policies and practices instituted by Multnomah County contribute to more positive feelings of belonging and acceptance as well as fairness and equity models for numerous organizations and government jurisdictions (Advisory Council Logic Model).

Glossary

Terms and Concepts

Belonging (also belonging-based and belongingness)

Acceptance as a member or a part.[36]

Emotional Intelligence

A term created by two researchers – Peter Salavoy and John Mayer – and popularized by Dan Goleman in his 1996 book of the same name. Emotional Intelligence is the ability to recognize, understand and manage our own emotions; and to recognize, understand and influence the emotions of others. In practical terms, this means being aware that emotions can drive our behavior and impact people (positively and negatively) and learning how to manage those emotions – both our own and others – especially when we are under pressure.[37]

Equity (non-finance/accounting)

Justice according to natural law or right; specifically, freedom from bias or favoritism (Source: Merriam-Webster).

Implicit Bias

"Describes when we have attitudes towards people or associate stereotypes with them without our conscious knowledge. A fairly commonplace example of this is seen in studies that show that white people will frequently associate criminality with black people without even realizing they're doing it. Implicit bias is a universal phenomenon, not limited by race, gender, or even country of origin."[38]

Microaggressions

The term was coined in the 1970s by Chester Pierce, an African-American professor of education and psychiatry at Harvard University, and it refers to the slights, putdowns and invalidating remarks that racial minorities experience every day when interacting with people who unknowingly engage in implicit racism.[39]

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[36] Karyn Hall, PhD, "Creating a Sense of Belonging," Psychology Today, May 24, 2014, https://www.psychologytoday.com/us/blog/pieces-mind/201403/create-sense-belonging/ (accessed August 5, 2018).

[37] Institute for Health and Human Potential, https://www.ihhp.com/meaning-of-emotional-intelligence/ (accessed August 31, 2018).

[38] Perception Institute. https://perception.org/research/implicit-bias/ (accessed August 31, 2018).

[39] Sarah Hampson, "Derald Wing Sue on microaggression, the implicit racism minorities endure," May 16, 2018, https://www.theglobeandmail.com/life/relationships/derald-wing-sue-on-microaggressions-racism/article30821500/ (accessed August 5, 2018).

Othering (also Otherness)

"A set of dynamics, processes, and structures that engender marginality and persistent inequality across any of the full range of human differences based on group identities; a term that not only encompasses the many expressions of prejudice on the basis of group identities, but also provides a clarifying frame that reveals a set of common processes and conditions that propagate group-based inequality and marginality."[40]

Safety, Trust & Belonging

A higher principle and goal developed by MC leadership and staff as a common thread that weaves throughout the organization to create a work environment that promotes equity and inclusion among all individuals.

Targeted Universalism

"The idea that we share a universal goal — such as a healthy, well-educated family — but have different means of achieving that goal due to our economic, cultural, social, and physical situations. This idea enables us to recognize differences while exploring commonality, to seek to eliminate roadblocks to full and equitable participation, and to leave no one behind in pursuing universal goals."[41]

Workforce Equity

Workforce equity is when the workforce is inclusive of people of color and other marginalized or underrepresented groups at a rate representative of the greater Seattle area at all levels of City employment; where institutional and structural barriers impacting employee attraction, selection, participation and retention have been eliminated, enabling opportunity for employment success and career growth.[42]

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[40] john a. powell and Stephen Menendian, "The Problem of Othering: Towards Inclusiveness and Belonging," Introduction, June 29, 2017, http://www.otheringandbelonging.org/the-problem-of-othering/ (accessed August 5, 2018).

[41] Haas Institute for a Fair and Inclusive Society. https://haasinstitute.berkeley.edu/vision/ (accessed August 5, 2018).

[42] City of Seattle, Department of Human Resources, Workforce Equity Strategic Plan, July 1, 2016, page 4.

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Appendices

1. Summary of Recommendations by the Advisory Council Work Groups
2. Logic Model

Appendix 1

Recommendations Proposed by Advisory Council Work Groups

The following pages contain a combined total of 14 goals and 82 recommendations yielded from the diligent efforts of the 4 work groups:

- to improve the conditions within the work environment.
- to address, mitigate, and ultimately eliminate harmful and unproductive actions such as othering, microaggressions, implicit bias, fear of retaliation, etc.
- to work toward a culture that improves morale, productivity, and a greater sense of belonging and visibility.

Leadership and Management of a Culture of Safety, Trust and Belonging

Both concepts are referenced throughout all the work groups' efforts. They recognize the difference and importance of each and use the following definitions to illustrate their work:

Communicate – through verbal, written, and role modeling – exemplary behavior that attends to both leadership and management expectations of performance:

Leadership: visionary, inspirational, and motivational in moving those operating within systems toward understanding, engaging in and embracing positive outlooks intended to improve/expand circumstances beyond the status quo that has been deemed unfair or inequitable.

Management: tactical, organized, responsible and dependable service in support of expediting, overseeing, documenting and correcting problems associated with visionary change.

Equity and Inclusion, Diversity, Racial Disparity, Cultural Appropriateness

The work groups employed all these principles as they engaged with each other to design the recommendations to follow. To avoid distracting repetition, these descriptors appear in many places among the recommendations, but are also understood in areas where they are not explicitly stated.

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Management Work Group:
Cultural Change, Training and Communications

Work Group Charter

Purpose: Address both leadership and management roles and responsibilities in shaping the vision of a renewed County commitment to equity and inclusion, coordination and oversight of strategies and objectives to achieve desired outcomes and provide consistent and effective communication to the workforce to achieve desired outcomes.

Recommendations

Goal 1: Recruit, onboard and develop managers consistently across the County to ensure the values and expectations of Multnomah County for cultural competency, emotional intelligence, compassionate communication, etc., are infused into management practice.

1. Develop a talent acquisition model that prioritizes leading with equity and inclusion.

2. Build a more comprehensive orientation and onboarding model for managers/supervisors that focuses on a refreshed set of leadership values.

3. Create a culture of ongoing development – learning to lead with inclusion is an ongoing journey.

4. Classify managers and supervisors as a defined population in the Multnomah County workforce (n=400) and provide incumbents as well as new hires with specific tools and opportunities that focus on their capacity to lead, manage within, and sustain an established culture of safety, trust and belonging.

5. Develop and utilize multiple modes to provide more comprehensive orientation and onboarding of managers/supervisors with emphasis on values as well as skills.

6. Training and orientation must include active participation of managers in diversity and inclusion with a focus on cultural responsivity, implicit bias fundamentals, managerial trauma and healing, equity analysis, etc., so that all managers have skills and knowledge to employ diversity and inclusion principles in their everyday work.

7. Hold managers accountable to establish regular meetings with their direct reports as further defined in position descriptions and performance reviews.

8. Develop accountability mechanisms and standards for reporting progress in supervision of employees and managing implementation of equity and inclusion practices.

9. Require that all managers participate in and evaluate their experience with management and supervision tools inclusive of but not limited to: participation in workshops, online seminars, self-directed learning, courses for individuals registered in trade or other institutions of higher education, onsite support groups for managers, or other opportunities approved as a best practice by Central Human Resources and ODE.

10. Require, as a condition of hire, that each manager commit to a personal development plan that includes their intent to master equity and inclusion management skills, inclusive of essential "belonging-based" skills and understanding.

11. Support expansion of management and supervision personnel position descriptions to include coaching and establishing a joint commitment to achieve growth between themselves and their direct reports.

12. Support expectations that expert managers show "inspiring leadership in promoting racial justice and eliminating structural inequities and oppression, within the organization and communities served."

13. Notify the Office of Diversity and Equity in a timely manner of all promotions for exempt management positions to assure appropriate diversity goals are being met with the candidate pool (targeted universalism).

Goal 2: Revised employment practices and structures incorporating the lead thinking on equity and inclusion in workforce development. Priorities include:

1. Develop a leadership scorecard that is reviewed quarterly and improved upon as needed.

    a. Examples of scorecard metrics: retention and promotion of staff (emphasis on EOC), probationary retention rates by race/gender, formal and informal check-ins and performance reviews completion.
    b. Examples of expectations: managers are expected to meet with employees monthly with feedback on expectations, etc. – be a part of their assessment as managers; distinguish expectations for meeting with staff to review performance vs other things like accommodations, career development, etc.

2. Develop a toolkit of assessment tools to improve self-awareness and increase employee voice in their experience of their leader (360s, stay interviews, skip-level, etc.); set requirements for how and when these tools are used.

3. Implement a professional development expectation for managers.

4. Research and align the best practices from LEAP (Seattle Equity Model) and Universal Access.

5. Develop a comprehensive Equity Toolkit and heightened expectations about the requirements to use the Equity Lens, etc.

6. Create a glossary of terms – shared language – around equity, inclusion, diversity, cultural competency, etc.

7. Establish pathways to employment that offer pre-service orientation to work within Multnomah County Government.

8. Assure equity and inclusion policies and practices are included in application, recruitment, hiring panels, and onboarding experiences as part of the MCHR Department responsibility.

9. Revise and implement employment policies with an equity and inclusion lens.

10. Expand and enhance Diversity and Cultural Competency Trainings, etc.

    a. Support for required competencies (e.g., experiential, online, traditional).
    b. Core-required Diversity training using experiential methods that promote greater self-awareness and emotional intelligence.

11. Create clear guidelines that are shared during onboarding that have specific expectations about leading a team (focus on emotional intelligence, equity lens, creating an inclusive environment, etc.)

12. Create a "Disabilities Support Specialist" position as a centralized resource and liaison.

    a. Hire and train the specialist as subject matter expert for inclusion matters related to disability.
    b. The Specialist performs multiple functions, including education, training (managers, supervisors, and employees), access, accommodations, purchasing, additional recruitment, etc.
    c. The Specialist also collaborates with appropriate external groups, such as the Invisible Disabilities Association (IDA), to stay abreast of field developments and ensure Multnomah County remains at the forefront of the equity movement.

Goal 3:   Create a framework in which leaders are accountable for creating and sustaining an inclusive workplace where employees can bring their whole selves.

1. Develop a leadership development model that aligns with 70/20/10 learning philosophies;[43] the model should focus on leading with equity and desired outcomes should link back to this.

2. Identify clear, desired outcomes to be included in manager position descriptions and PPRs; define success and align it with various learning approaches to determine leader is progressing appropriately.

3. Ensure shared language; values/competencies used during recruitment of manager should be the same values/competencies used in ongoing leadership development.

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[43] Center for Creative Leadership.

4. Promote self-organizing among staff and managers, support peer-to-peer learning and the sharing of power, and share skillsets that promote experiential learning among colleagues.

5. Create a culture of ongoing personal and personnel development – learning to lead with inclusion is an ongoing journey.

6. Develop and implement employment interview techniques inclusive of diverse cultural norms and mitigate the effects of implicit bias.

7. Innovate and promote cultural responsiveness and respect in county-driven media, yielding enhanced and new relationships with community partners and other external stakeholders as the County makes strides in equity and inclusion.

Goal 4: Create a sustainable, multi-faceted communication strategy that approaches this model as a true culture change initiative; the communication strategy should ensure that employees at all levels of the organizations are informed, educated and aware of what is changing, and how and why.

1. Gain buy-in and behavior change through a long-term communication strategy that identifies the various audiences and caters the communication approach to "why does this matter to me?" Create a "WIFM" (What's In It For Me) roadmap for each impacted audience.

2. Identify the multiple audiences within the workforce.

3. Identify the various initiatives already in the works that impact/align with this work.

4. Research current modes of communication (what is working, who is reading/accessing the communication, how is it shifting behavior).

5. Do a gap analysis about current communication modes and mission communication modes (i.e., we are very email heavy for communication and this is not the most effective way to shift a culture).

6. Research communication best practices for large-scale change initiatives in other large organizations.

7. Identify metrics and benchmarks to track success of communication strategy.

Structural Impediments Workgroup

Work Group Charter

Purpose: To recommend policies, practices and departmental reorganization as well as reporting channels that better support the psychological and emotional safety of County employees who experience marginalization, exclusion and 'othering' in work settings and to systematically identify and reduce such impediments to equity and racial equity efforts.

Recommendations

Goal 1: Assess power relationships to assure accountability and oversight for implementation of recommendations.

1. Implement a power analysis to discern how governance and management positions align to advance the stated goals and strategies; assure that responsible departments within the structure have the requisite power, authority, resources and leadership to execute responsibilities.

2. Identify areas of concern where County policies go unenforced or where resistance is documented that operates against policy and practice guidelines; implement a transparent process of building bridges to engage individuals or groups that are identified as resistant to or obstructive of equity and inclusion policies.

3. Articulate and incorporate in codes and policies the leadership expectations for Board of County Commissioners, senior executives, department heads, management positions that guide actions and provide basis for demonstration of support for principles of equity and inclusion.

4. Publish a County organizational chart that clearly illustrates the structural position and placement of departments and their explicit reporting, accountability, and decision-making lines of authority to assure that each department operates with a code that clearly outlines its responsibilities to lead, implement, enforce and monitor equity and inclusion policies.

Goal 2: Resolve the placement and organization of the Office of Diversity and Equity.

1. Examine current conditions in ODE to assure alignment and capacity to fulfill its code.

2. Better define the roles of ODE, Central HR, Department HR, and Department Directors in consultative and decision-making responsibilities that shape workforce equity actions.

   a. Clarify specific roles and responsibilities for each position within ODE and each position in HR that touches equity actions and distinguish levels of effort required for internal/external operations.

b. Clarify and specify responsibilities for the ODE Civil Rights Officer; update the position description and recruitment and onboarding strategies for all ODE and HR positions.

c. Distinguish and eliminate duplication and overlap of responsibilities between ODE, Central HR, Departmental HR and Department Heads.

d. Clearly define roles, responsibilities and levels of transparency needed among ODE, Central HR, Department HR and Department Management, before an employee is released from County service.

3. Assure highest levels of confidentiality are maintained while also assuring highest levels of fairness and equity reviews are implemented, balanced and operational.

4. Address the need for accountability, oversight and on-going involvement of stakeholders in the implementation of recommendations of Management, Complaints and Structural Impediments work groups.

Goal 3: Strengthen Governance Policies and Priorities.

1. Consider the need to augment the County Charter with more specific inclusion and equity language and requirements that would eliminate structural barriers within County Government operations and throughout the County and its services.

2. Distinguish between Leadership and Management functions for key roles throughout the County structure; articulate what is meant by leadership.

Complaints Process Improvements Work Group

Work Group Charter

Purpose: To address complaints rooted in equity and inclusion dynamics within the Multnomah County Government workforce. Such complaints are recognized as a central problem in achieving a fair and just workplace free from fear of seeking rights and retaliation as a result of filing a complaint for protected classes of employees. The work group focused solely on complaints involving protected classes and changes needed to bring about a more equitable approach to resolution and consequential actions.

Recommendations

Goal 1: A centralized unit staffed by a diverse set of skilled investigators charged with investigating only Protected Class Complaints and applicable high-risk complaints.

1. Place the centralized unit under the COO as a non-departmental "agency," continuing the important practice of having top-level oversight, and staff with the appropriate combination of skilled internal employees (including possible new hires) or contracted external experts.

2. Conduct ongoing, relevant professional development and experiential learning for those expected to serve on the centralized unit, to also include ensuring that Investigation Staff are oriented to and grounded in principles of equity and inclusion, and are able to view complaints and proposed actions through the equity and inclusion lens adopted by the County.

3. Establish governance and codes of conduct to guide the centralized unit to assure their deliberations meet the high-level principles of MC Workforce Equity policies and practices. These include independent practices for collaborative thought and action, the highest levels of confidentiality, rigorous application of equity and inclusion standards, dependable and trustworthy service during regular work hours, and a thorough understanding of legal requirements in the context of a union environment.

4. Charge the centralized unit with regularly, or as necessary, reporting key themes and learnings to County leadership, i.e., COO, BOCC Chair, etc.

5. Redesign/refresh the existing complaints resolution process using an Equity & Inclusion lens and ensure all members of the centralized unit are fully trained in the process and that County Leadership fully understands and endorses the improvements.

6. Develop a rating instrument for Protected Class Complaints, including using an equity and inclusion lens to determine varying levels of severity and perhaps appropriate responses/actions that have proven effective in the field.

7. Collaborate with evaluators and submit timely data reports to track progress.

8. Continue collaborating with the stakeholders currently involved in the existing Protected Class Complaint Process, e.g., COO, ODE, Labor Relations, County Attorney's Office, Central HR, Department HR, Department Director, etc.

Goal 2: Monitor and move complaints to resolution to include a clear consequential action process

1. Every MC employee will be advised of the Protected Class Complaints process available for infractions of the MC Personnel Policies.

2. Race, ethnicity, spiritual practice and cultural differences will be given serious consideration when workplace conditions fail to honor or support differences or cause employees to feel unsafe, distrusted or unwelcomed.

3. Persons with Disabilities will be able to file complaints based on practices that cause unfair burden on them in terms of timelines for completing work assignments, inappropriate assignments given a disabling condition, lack of opportunity for promotion and recognition.

4. Members of underrepresented populations will be recruited, trained, and encouraged to serve on the centralized unit.

5. The diverse group of individuals eligible to serve on the centralized unit will also possess an equally diverse skillset and professional experience. Important skills and personal attributes include active listening, ability to adhere to meeting protocols, demonstration of emotional intelligence, understanding of implicit bias and the ability to minimize its display, etc. Other considerations include cultural competencies such as respect for cultural differences, cultural humility, and knowledge of the laws and regulations that govern fair employment.

Goal 3: Evaluate, document, and integrate lessons learned from the Revised Complaints Process.

1. Design evaluation component for complaints process.

2. Collect recent baseline data against which to measure progress and inform potential future enhancements to this ongoing work.

3. Assure the plan maintains highest the levels of confidentiality for individuals involved.

4. Capture and analyze data over three years that evaluate trends with the number and type of complaints: trends within departments, divisions or work units, and assesses the experience of employees across the organization related to complaints.

Goal 4: A comprehensive conflict resolution program including logical and complementary processes attached to the complaints process.

1. Review and enhance the Appeals Process which allows for a subsequent review of a complainant's outcome, including a review by the stakeholder group (e.g., COO, ODE, County Attorney, Labor Relations, etc.) before final report findings and final discipline recommendation.

2. Design a separate set of metrics for a Misconduct Investigation, but still aligned the refreshed complaints process and using an equity and inclusion lens.

Workforce Equity Strategic Plan: Implementation Work Group

Work Group Charter

Purpose: To focus on recommendations of policies and practices that advance the principles and actions required to achieve goals outlined in the WESP.

Recommendations

Goal 1: Establish oversight and accountability mechanisms to assure WESP implementation.

1. Update Work Force Equity Strategic Plan to coincide with submission of this report to be submitted to the Board of County Commissioners on/about September 25, 2018.

2. Establish launch date for Plan Implementation and charge COO with responsibility to chair, manage, organize logistics and assure across the board participation from various employee sectors.

3. Hire a full-time Project Manager to directly report to the COO with position description that reflects authority and resources to implement the plan according to approved recommendations.

4. Establish the Workforce Equity Strategic Plan committee, sponsored by the Chair and convened by the Office of Diversity and Equity that includes internal and external partners and provides annual reports to the Board of County Commissioners.

Goal 2: Provide guidance for coordination of WESP and departmental plans.

1. Recommend how coordination of WESP will interface with departmental plans for implementing objectives and outcomes in response to the COO directive to submit by 10/1/2018.

2. Propose integration and grounding of departmental plans in best practices for Safety, Trust and Belonging.

3. Assess timelines and resources at Departmental level to assure alignment with Countywide Planning and appropriate resourcing of efforts to achieve equity and inclusion goals.

4. Organize tools and well-crafted (tested) messages for Departmental Equity Teams to use in advancing the WESP at the department level.

5. Establish, standardize or adopt an Equity and Empowerment Lens, Racial Equity Toolkit, and/or other applicable equity and inclusion-based tools to facilitate departments' and employees' efforts to transform the work environment into a Safety, Trust and Belonging culture.

Goal 3: Implement active monitoring of recommendations with respect to promotion, retention and professional development policies and practices with a focus on:

1. Encourage and monitor personal development plans of employees with aspirations for promotion to positions of supervision and management.

2. Establish a process for review and oversight of promotion opportunities to assure announcements, interview questions, qualification standards and applicant pool reflect Equity and Inclusion best practices.

3. Interview panels will reflect employees from protected classes; employees that are representative of race, gender, cultural and religious affinity will receive training essential to interview skills and review of Workforce Equity Plan goals and standards.

4. Interview questions appropriate for use by all departments will be standardized and include questions designed to obtain insights and assessment of applicant's attitudes and skills to positively contribute to Multnomah County goals, values and equity/inclusion standards.

5. Conduct review of probationary terminations before they are implemented with a focus on protected classes, and with particular attention on African American employees. Assess data on actions that lead to reduction in disparities and report progress to higher authority.

Appendix 2

Logic Model

Multnomah County Advisory Council Logic Model   JUNE 2018

assumptions	resources	inputs	actions/outputs	outcomes	
A critical mass of dedicated and respected leaders within Multnomah County Government is required to fully address structural impediments, historical injustice and manage organization changes that improve organizational culture, policies, practices and resources to support equity and inclusion goals.	Dedication of County funds and time to provide expert assistance	Preliminary approval of WESP with expectation of refinement	Regularly scheduled meetings with specific objectives and outcomes	Increased awareness among Advisory Council members of management skills, leadership skills essential to effectively managing organizational change	**Short Term**
	Dedicated executives and managers committed to success	Interviews & other opportunities for informing WESP by relevant sample of employees to ensure JRG & AC understand the relevant issues fully, including strengths & weaknesses	Defined outcomes for inclusion in final recommendations that are expected to yield impacts	Concrete recommendations for changes and implementation plan for these changes, including timelines and responsible parties	
Appointment of an Advisory Council represents an effort to engage a range of MC executive managers, leaders of Employee Resource Groups and Department managers to move actions related to the WESP to confirmation by Board of Commissioners.	Employee resource groups energized and dedicated to improvements and success	Opportunities to review and confirm details in facilitated meetings	Establish criteria for evaluation of meetings, consultant support and work products	Communication plan for all employees: to communicate recommendations/ implementation plan; in case of new policies, to communicate new policies to all employees	**Intermediate**
	Advisory Council organized to capture best thinking from diverse sectors with MC government		Approval of timelines and work products needed for final report	Measurable improvements in employee trends data, increase safety, trust and belonging for all employees	
The Advisory Council is expected to deliberate on approaches and methods to achieve results established in the approved WESP (any additional results recommended by the AC) and lead forward the efforts of Multnomah County to address and reconcile documented problems that impede an open, trusting and accepting environment for all employees.	Work groups willing to serve as thought partners	Coordinating Committee & Work Groups	Practice collaborative and inclusive methods for moving work	Stronger networks and alliances among employee leaders and managers	**Long Term**
		Employment trends data to serve as baseline	Research on promising practices in all relevant sectors, i.e.: management, practices, complaints, accommodations	New, diverse individual and organizational stakeholders/champions	
	Research and evaluation	Guidance of consultant team		Creative and effective tools and models used in other jurisdictions (embedded in plans)	
	Relationships of Advisory Committee members (both within group and to other employees)	Opportunities for sub-groups to refine and report back to AC with comments/concerns/recommendations	Agreement on a set of desired changes, policies or practices to implement moving forward	Increased knowledge, skills and spaces to develop a coordinated and shared equity/inclusion agenda among various components of MC government	
			Celebration of achievements	Increased engagement commitment by County leadership to shape and advance equity and inclusion policies	

ULTIMATE IMPACT: Equity and inclusion policies and practices instituted by Multnomah Council contribute to more positive feelings of belonging and acceptance for employees as well as fairness and equity models for numerous organizations and government jurisdictions.

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