



American Planning Association  
**Oregon Chapter**

*Creating Great Communities for All*

## MEMORANDUM

**Date:** January 17, 2022

**To:** Samantha Morse, APA Leadership Associate

**From:** Susan Millhauser, Program and Policy Coordinator, and Aaron Ray, AICP, Chapter President

**CC:** Puja Bhutani, AICP, DEIG Co-Chair and At Large Board Member; Genevieve Middleton, DEIG-Co-Chair; and Kirsten Tilleman, AICP, past President

**Subject:** Chapter Presidents Council Grant Final Report

This memorandum is the Final Report for the Oregon Chapter of the American Planning Association's (OAPA) Fostering Diversity and Inclusion in Oregon's Professional Planners grant.

### Background and Intent

*Grant Purpose* – OAPA's Fostering Diversity and Inclusion in Oregon's Professional Planners project was intended to better understand and reduce barriers to and foster diversity, equity, and inclusion among Oregon's professional planners in their daily practice, with consideration of replicability more broadly, in support of Chapter and APA goals. The project was a collaborative effort between OAPA and Portland State University (PSU) focused on identifying barriers and opportunities in educational and professional settings, and for implementation strategies that better prepare, retain, and support planners so they can work more effectively and inclusively in Oregon's diverse communities. OAPA used the grant funds to help complete the following tasks:

- Task 1 – Support the dissemination of PSU's research and recommendations to a broad audience of Oregon planning professionals;
- Task 2 – Implement outreach, training, and events focused on equity, inclusion, and diversity; and
- Task 3 – Develop a more formal diversity and inclusion strategy for the Chapter.

*Grant Amount* – \$4,000. Amount received from APA as of May 2019 – \$2,666.66. The Chapter was granted an extension for completing this grant in 2019.

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#### Oregon Chapter President

Aaron Ray, AICP



## Description of the Process Involved and Transferability

The following is an overview of the steps taken to complete the project, organized roughly by dates, tasks, and activities (note that there is a lot of overlap). Information related to transferability is also noted where appropriate, including links to materials produced that could serve as models and observations that other chapters may find useful.

*September 2018 – April 2019, Task 1: PSU Report and Dissemination and Task 3: OAPA DEI Strategy*

OAPA worked with Megan Horst, PhD, AICP, Assistant Professor in the PSU, Nohad A. Toulon School of Urban Studies & Planning (TSUSP), to develop a scope of work and contracted with Mari Valencia, a recent PSU Masters in Urban and Regional Planning graduate, to write a report summarizing PSU's spring 2018 focus groups with students of color, and to conduct research and make recommendations related to integrating diversity, equity, and inclusion (DEI) strategies into the Chapter's work, including review of other chapters' DEI activities and OAPA's Strategic Plan 2018 Update and biennial membership survey.

The resulting report, *Fostering Diversity, Equity and Inclusion in the Oregon Chapter of the American Planning Association*, Megan Horst, PhD, and Mari Valencia, April 2019, available at [https://oregon.planning.org/documents/4793/2019\\_0416\\_OAPAReporT\\_DEI\\_ValenciaHorst.pdf](https://oregon.planning.org/documents/4793/2019_0416_OAPAReporT_DEI_ValenciaHorst.pdf), includes the following sections:

- Recommendations and Key Takeaways
- Part One: TSUSP Focus Groups with Students of Color
- Part Two: Dialogue with OAPA Leaders and Members
- Part Three: Research on APA Chapters and their Diversity, Equity and Inclusion Efforts
- Part Four: OAPA Strategic Plan Review

Mari developed and delivered a panel discussion on October 18, 2018 at the OAPA Annual Conference titled "Challenges as Opportunities: An Interactive Discussion on Social Equity and Inclusive Growth," in coordination with members of OAPA's Emerging Planners Group (EPG). A description of the conference session and notes taken are linked [here](#). Mari and Dr. Horst participated in a panel session at OAPA's Legal Issues Workshop entitled "Diversity in the Profession – Ethics and Career Advancement in Planning Panel Session" on December 7, 2018. The PowerPoint presentation is available [here](#).

*September 2018 – On Going, Task 1: PSU Report and Dissemination and Task 3: OAPA DEI Strategy*

OAPA formed a diversity, equity, and inclusion working group in 2018 to inform and support the work being completed under the grant, including Kirsten Tilleman, AICP, then OAPA Chapter President; Susan Millhauser, OAPA Program and Policy Coordinator; Mari Valencia, PSU MURP graduate; Dr. Megan Horst, Assistant Professor and Chair of the TSUSP Diversity & Equity Committee; Anna Dearman, AICP, Chair of OAPA Emerging Planners Group; and Adrienne Chaillé, OAPA Board Student Representative, Portland State University. Subsequently formalized as the Diversity, Equity, and Inclusion Group (DEIG), with a charter approved by the OAPA Board in August 2019, additional members joined to expand the focus beyond the grant project. The DEIG meets monthly and works across OAPA committees and with the Board to integrate DEI strategies into OAPA's offerings,



advocacy, and operations. The DEIG develops and drives tactics, projects, and programs, and serves as a resource for the Board and committees, in keeping with OAPA's mission, vision, goals, and objectives. More information about the DEIG, including the charter, is available at <https://oregon.planning.org/about/committees/deig/>.

**Transferability** – The above processes and products may help to inform other chapters as they develop strategies to integrate DEI into their work. Working with PSU was a natural fit for OAPA, and other chapters may want to explore partnerships or opportunities with a local university to support the dissemination of similar research. Professional development is a key focus for OAPA and having a clearer understanding of the barriers and opportunities to better address the needs of Black, Indigenous, and People of Color (BIPOC) students and planners is critically important.

#### *January – May 2019, Task 2: DEI Training and Events*

The EPG organized two Lunch and Learns with a DEI focus. The purpose of the EPG Lunch and Learn Series is to offer educational and networking opportunities for students and emerging planners with established planners and related professionals.

- PCRI Pathway 1000 Initiative Tour, led by Julia Metz, PCRI Interim Director of Housing Development, was held on January 15, 2019. This event was to tour new affordable housing developments in North and Northeast Portland developed as part of the Portland Community Reinvestment Initiatives (PCRI) Pathway 1000 Initiative. For more than 25 years, PCRI has reinvested in Portland's neighborhoods, preserved their diversity, and provided tools to help low-income Portland families and individuals achieve stability and self-sufficiency.
- The New Faces of Community Engagement in Washington County, was held on May 20, 2019. Rapidly growing with shifting demographics, Washington County is a place in transition. In an effort to reach and include everyone, we must change the way we think about community and our approach to engaging community members in decision making processes. Over the past three years Washington County has created a Community Engagement program that looks beyond any one specific programmatic focus to comprehensively engage the whole community. Amanda Garcia-Snell, Community Engagement Manager for Washington County, shared how Washington County got to this place and where it is going in the future.

**Transferability** – The EPG Lunch and Learns were a natural place to further integrate DEI-focused events into the Chapter's offerings. The Lunch and Learns are a low barrier educational opportunity for participants, typically low or no cost as host organizations provide free meeting space, and for the event organizer as the host provides the educational content. Having events with a focus on DEI help to inform and educate planners and allied professionals on important topics in an informal setting. Also, emerging planners and recent masters in planning graduates in Oregon represent a more diverse cross-section of planners, introducing new people to OAPA and providing an opportunity for involvement and engagement. Other chapters may want to review their current programs and educational offerings to identify low barrier opportunities for participants to gain knowledge of DEI work and to involve emerging and more diverse planners in their organizations.



*October 2019 – March 2020, Task 3: OAPA DEI Strategy*

DEI training for Board and Committee members to help develop a shared understanding, framework, and common language was identified as an important step in more formally integrating diversity, equity, and inclusion efforts into the OAPA's work. Two initial training opportunities were offered, including:

- Participation in the Non-Profit Association of Oregon's Equity and Inclusion Leaders Network sessions was offered to Board and Committee members. Participants were asked to gather relevant training materials and provide a summary of takeaways so other Board and Committee members could also access the information ([available here](#)). The series was cut short due to COVID. (10/2019-3/2020)
- Members of the DEIG participated in a facilitated training in partnership with the Oregon Humanities Conversation Project entitled Race and Place: Racism and Resilience in Oregon's Past and Future, as part of an annual retreat. Held in person, the training was intended to help members get to know each other in person and to explore and discuss beliefs and experiences around diversity, equity, and inclusion. (1/23/2020)

Transferability – Initially, OAPA sought to find DEI training opportunities that were already available in the community to reduce cost and volunteer and staff planning time. In terms of organizational change, it was important to gain a better understanding of how non-profits more broadly have been approaching integration of DEI strategies, what tools and strategies were helpful, and to learn from other organizations who may be further along on their journeys. As the DEIG began to expand to include new members, the co-chairs felt it was very important to have a meeting where people would have an opportunity to meet and explore DEI beliefs and experiences. Several members had participated in Oregon Humanities Conversation Project sessions in the past and felt the format would be a good fit for the DEIG's retreat. Additionally, Oregon Humanities, as a non-profit, offers an affordable fee for their work based on an organization's budget, allowing OAPA to offer this training to our volunteers. Other chapters would be encouraged to research existing local training opportunities with other non-profits to determine if initial DEI training needs can be met that way.

*July 2020 – November 2021, Task 2: DEI Training and Events and Task 3: OAPA DEI Strategy*

*Anti-Racism Listening Sessions* – Three facilitated anti-racism listening sessions were planned by DEIG members, Board leadership, and staff to further develop a shared understanding, gather input, and refine strategies to better integrate DEI activities and approaches into OAPA's work through annual business planning and other projects.

The first facilitated anti-racism listening session, geared toward Board and Committee volunteers, was held on July 17, 2020, with assistance from Anita Yap, Principal, Multicultural Collaborative, LLC. Anita provided facilitation services and worked with the session planners to create the agenda and plan logistics, such as assigning break out rooms in advance to provide a safer space for BIPOC participants (with people self-identifying as part of the meeting registration). A memo summarizing the listening session is available [here](#). Intended outcomes from the session included:

- A shared understanding of what anti-racism means and why it is relevant to planning, the organization, and as individuals.



- Increased understanding of why OAPA's diversity, equity, and inclusion efforts have led with race, as anti-racism work develops widely-applicable skills for shaping equitable spaces for all forms of diversity to flourish (e.g., rural/urban, age, ability, gender identity, sexual orientation, income, etc.).
- Awareness that these discussions and this work benefit us all.
- Identify focuses for OAPA's equity training program and offerings.

Two additional anti-racism listening sessions were planned and facilitated by OAPA volunteers, with support from staff, to gather further input and refine the Chapter's strategy and next steps.

- A session for OAPA members was held on October 15, 2020 at the Chapter Business Meeting. At the session, Aaron Ray, AICP, President, provided context and background with a summary of the July 2020 listening session and subsequent Board conversations held in August and September 2020. Then the group discussed challenges and opportunities members face related to anti-racism, diversity, equity, and inclusion and how the Chapter can help. A summary memo is available [here](#).
- The DEIG planned and hosted a listening session to hear from BIPOC planners, planning graduate students, and allied professionals on March 30, 2021. The session was intended as a space for participants to connect with each other and share aspirations, experiences, and challenges as BIPOC professionals. OAPA also sought to understand how to support BIPOC professionals and to gauge interest in forming a standing BIPOC group. A summary memo is available [here](#).

Transferability – The anti-racism listening sessions were not initially planned as part of the Chapter's DEI work. However, after the murder of George Floyd in May 2020 and the subsequent invigorated Black Lives Matter movement in Portland and Oregon more broadly, conversations on the Board about the Chapter's response and other dialogue happening around the state helped the Board and DEIG more clearly realize that conversations around race and the planning profession's role in institutional racism were challenging to have. The July 2020 listening session was crafted in a way to provide a space for Board and Committee members to have hard conversations and to help increase understanding of the importance of leading DEI conversations with race.

The session held at the Chapter Business Meeting provided an opportunity for the Board to provide an update to membership and hear more voices on an important topic to ensure that the organization was on the right track to serving all members needs as membership is not monolithic in its views of the world, especially in a state with a urban and rural divide. The BIPOC listening session was planned based on feedback from the prior two listening sessions, where participants expressed a need to be able to share in a safer setting; to offer an opportunity for BIPOC planners, allied professionals, and students to discuss issues and experiences that are different from the dominant white majority; and to provide a place for connection and networking.

The takeaway for other chapters is that it is important to be nimble and open to changing strategies or tactics when events happen outside of the organization in order to help further dialogue and understanding. It is also important to engage and seek feedback from members more broadly to hear different perspectives and to ensure leadership does not get out too far ahead. Most importantly, providing a safer space for BIPOC professionals and students to connect, share, and support each other is especially needed.



*Foundational Journey Towards Equity* – Members of the DEIG and staff researched and developed a strategy for foundational conversations, or trainings, as a step towards building awareness and capacity for anti-racist practices, with the intent of creating an opportunity to develop social justice habits and a deeper understanding of how inequity and racism affect people’s personal and professional lives and work. Envisioned as a series of dialogues preceded by individual self study, a tiered pilot approach was developed, with the conversations starting with Board and Committee volunteers and a future goal of tailoring for OAPA members and Oregon planners more broadly based on feedback and future available resources.

To support this effort, DEIG members, with staff support, developed two amazing online resources geared toward planners, allied professionals, and planning students: the [OAPA Diversity, Equity, and Inclusion and Racial Justice Resource Guide](#) and the [OAPA Racial Equity Glossary](#). Reflected in the offerings is OAPA’s commitment to lead its equity work with race, with an emphasis on the intersectionality of anti-racist work. Learn more about these resources at <https://oregon.planning.org/knowledge/diversity-equity-and-inclusion-resources/>.

For the dialogues, or trainings, DEIG volunteers honed down the desired outcomes and issued a request for information to identify potential contractors to develop and facilitate the training. Margarita Gutierrez and Emily Drew were hired and worked with members of the DEIG to develop and deliver two virtual sessions, including “Understanding Systemic Racism as an Arrangement of Power,” held on October 21, 2021, and “Antiracism as Intervention” on November 8, 2021. OAPA has retained the presentation and learned techniques that can be used for future trainings. The conversations held during the trainings, feedback provided via a survey afterwards, and subsequent discussion at the Board’s November 19, 2021 meeting will inform future trainings, committee work plan development, and the Chapter’s update to the Strategic Plan, planned for 2022. The [OAPA Racial Equity Training](#) includes presentation materials and notes from small group discussions.

Transferability – DEIG volunteers and staff spent a lot of time and energy researching training opportunities and discussing potential topics and approaches. These conversations were very fruitful and in the end it was determined that the it would be most beneficial to contract with a professional DEI consultant to narrow down the scope and facilitate the trainings. As an organization with a Board and committee volunteers that change over time, there was concern about investing a large amount of resources (time and money) on trainings that would only benefit the initial people who participated. The two facilitators who provided the training did an excellent job of tailoring the sessions to the Chapter’s needs, keeping in mind use by future OAPA volunteers and staff. Other chapters are encouraged to develop a strong understanding of their organization’s priority needs early on in the process of identifying potential DEI training opportunities and to be realistic about the capacity of volunteers to develop and implement these types of trainings.



## Accounting of Funds Expended Total, September 2018- December 2021

Item	Unit Cost	Total Cost
Mari Valencia, Contractor (Invoice 1, 11/28/18)	26 hours @ \$25/hour	\$650
Conference Travel Reimbursement (Mari Valencia, Invoice 1, 11/28/18)		\$176
Research findings presentations and report preparation - <i>Fostering Diversity, Equity and Inclusion in the Oregon Chapter of the American Planning Association</i> , Mari Valencia, contractor (Invoice 2, 4/16/19), Task 1	22.5 hrs@\$25/hour	\$562.50
EPG Lunch & Learns (Reimbursement Requests, 1/29/19, \$75.00; 6/16/19, \$267.50), Task 2		\$342.50
Board and Committee DEI training – Non-profit Association of Oregon Equity and Inclusion Leaders Network sessions, (Seasons Passes/Registration, 10/8/19), Task 3		\$234.50
DEIG retreat facilitated training, Oregon Humanities Conversation Project (Invoice, 1/23/2020), Task 3		\$150.00
Facilitated anti-racism listening session with Board and committee members, Anita Yap, contractor (Invoice, 7/31/2020)		\$650.00
Facilitated racial equity training for Board and committee members – 2 sessions, Emily Drew and Margarita Gutierrez, contractors (Invoice, 11/18/21)		\$1,200.00
<b>CPC Grant Funds</b>		<b>\$3,965.50</b>
<b>OAPA Personnel-In kind*</b>	130 hours @ \$50/hour	<b>\$6,500.00</b>
<b>Project Total</b>		<b>\$10,465.50</b>

\*Note: It was difficult to parse OAPA personnel in kind hours related to the grant from overall hours spent support the work of the DEIG. Additionally, the in kind hours do not include the many hours OAPA volunteers have spent on this work.

## Conclusion

This grant project has been extremely beneficial to OAPA in that it helped the Chapter more intentionally focus on DEI and start to more formally integrate strategies and practices into activities, professional development offerings, and operations. The grant funds helped to pay for research and training opportunities that had not previously been included in the budget, and since receiving the grant and the formation of the DEIG, there is now a budget line item for this type of work. A commitment to DEI and anti-racism has been made and is becoming an integral part of OAPA's work.





The focus on DEI supported by the grant has already helped the Chapter develop processes and tools that are institutionalizing DEI. For example, over the past year the following strategies and tools have been used or are being developed:

- Guidance for offering stipends to BIPOC presenters ([linked here](#)) was developed with the intention of increasing BIPOC representation and participation in OAPA programming and professional development offerings. The stipends are funded through event registration fees and recipients are requested to complete a brief survey about the stipend to inform future practices. So far the stipends have been used for two webinars, Anti-racist Planning Practice: An Indigenous Perspective, held December 16, 2020, and (Fatigue in) Anti-Racist Planning: A BIPOC Perspective, held November 5, 2021. (Both webinars are available to view on demand as well, linked here - <https://oregon.planning.org/knowledge/webinars/>)
- OAPA has increased the number of DEI-focused professional development opportunities available to planners across Oregon, via conferences, workshops, webinars, book groups, and other events.
- For legislative and policy activity, the Legislative and Policy Affairs Committee has identified BIPOC led organizations to consult with and offer support on positions to. Additionally, the Chapter has integrated anti-racism more deeply into legislative and policy priorities, which have also been translated into Spanish.
- The DEIG developed meeting agreements to help members have safer conversations. The Board and other committees are considering doing the same.
- Land acknowledgements were included at the 2021 Conference and as part of the December Legal Issues workshop.
- The Professional Development Committee, with input from the DEIG, is developing an equity framework worksheet intended to assist educational event organizers with the identification, planning, and presentation of educational topics. The worksheet represents aspirations to provide programming (including webinars, workshops, and mobile tours) that advances OAPA's equity and inclusion strategies and provides a guide to intentional decision-making during the planning and execution of educational programming. While still in the testing stage, once completed this tool will be made available publicly

The next logical step is to use a DEI lens or framework for the Chapter's strategic plan update, in consultation with membership, slated to start in 2022. The PSU report offers some germane recommendations. Also, some additional strategies that have surfaced through this grant project will be looked at more closely, including:

- Examining and updating governance and transparency practices, such as how meetings are run and how decisions are made.
- Looking at and updating onboarding for new Board and committee volunteers that center OAPA's DEI and anti-racism commitment.
- A more consistent approach to delivering land acknowledgements.

One closing observation is that chapters should start where they are at and look for opportunities that are low or no barrier to get started. Be open to having hard conversations and keep in mind that people are at different places in their understanding of and commitment to DEI and anti-racism. There is no one right way to do this work and missteps may occur, but an organization cannot plan for every eventuality (though as planners we think we can and we should!), the journey is a long one.





## **Oregon Chapter of the American Planning Association (OAPA) Fostering Diversity and Inclusion in Oregon's Professional Planners**

**Purpose** – OAPA's Fostering Diversity and Inclusion in Oregon's Professional Planners project was intended to better understand, reduce barriers to, and foster diversity, equity, and inclusion among Oregon's professional planners in their daily practice, with consideration of replicability more broadly, in support of Chapter and APA goals. The project was a collaborative effort between OAPA and Portland State University (PSU) focused on identifying barriers and opportunities in educational and professional settings, and for implementation strategies that better prepare, retain, and support planners so they can work more effectively and inclusively in Oregon's diverse communities. OAPA used the grant funds to help complete the following:

- Support the dissemination of PSU's research and recommendations to a broad audience of Oregon planning professionals;
- Implement outreach, training, and events focused on equity, inclusion, and diversity; and
- Develop a more formal diversity and inclusion strategy for the Chapter.

**Products** – Products and outcomes from this project include the following:

- The report *Fostering Diversity, Equity and Inclusion in the Oregon Chapter of the American Planning Association*, Megan Horst, PhD, and Mari Valencia, April 2019, available at [https://oregon.planning.org/documents/4793/2019\\_0416\\_OAPAReport\\_DEI\\_ValenciaHorst.pdf](https://oregon.planning.org/documents/4793/2019_0416_OAPAReport_DEI_ValenciaHorst.pdf)
- A panel session entitled "Diversity in the Profession – Ethics and Career Advancement in Planning Panel Session," from OAPA's 2018 Legal Issues Conference. The PowerPoint presentation is available [here](#).
- The formation of OAPA's Diversity, Equity, and Inclusion Group (DEIG). The DEIG works across OAPA committees and with the Board to integrate strategies into OAPA's offerings, advocacy, and operations. The DEIG develops and drives tactics, projects, and programs, and serves as a resource for the Board and committees, in keeping with OAPA's mission, vision, goals, and objectives. More information at <https://oregon.planning.org/about/committees/deig/>.
- Anti-Racism Listening Sessions – Three facilitated anti-racism listening sessions were planned by DEIG members, Board leadership, and staff to further develop a shared understanding, gather input, and refine strategies to better integrate DEI activities and approaches into the Chapter's work, through annual business planning and other projects.
- Foundational Journey Towards Equity – OAPA researched and developed a strategy for foundational conversations, or trainings, as a step towards building awareness and capacity for anti-racist practices, with the intent of creating an opportunity to develop social justice habits and a deeper understanding of how inequity and racism affect people's personal and professional lives and work. Envisioned as a series of dialogues preceded by individual self study, a tiered pilot approach was developed, with the conversations starting with Board and Committee volunteers and a future goal of tailoring for OAPA members and Oregon planners more broadly based on feedback and future available resources. To support this effort, OAPA developed two amazing online resources geared toward planners, allied professionals, and planning students: the [OAPA Diversity, Equity, and Inclusion and Racial Justice Resource Guide](#) and the [OAPA Racial Equity Glossary](#). Reflected in the offerings is OAPA's commitment to lead its equity work with race, with an emphasis on the intersectionality of anti-racist work. Learn more about these resources at <https://oregon.planning.org/knowledge/diversity-equity-and-inclusion-resources/>.