
MEMORANDUM

DATE: July 17, 2009
FROM: The Opportunity Agenda, NAACP Legal Defense Fund, The Center for Social Inclusion, and Leadership Conference on Civil Rights
RE: Proposed Metrics for Equitable and Expanded Opportunity in the Economic Recovery

This memorandum outlines a proposal from The Opportunity Agenda, NAACP Legal Defense Fund, The Center for Social Inclusion, and Leadership Conference for Civil Rights for measuring equity throughout the ongoing economic recovery process.

Ensuring that the American Recovery and Reinvestment Act (ARRA or the Act) meets its goals requires transparency and accountability with regard to equity and equal opportunity. Only by using performance metrics that look beyond simply whether money is being spent and toward whether the funds are expanding opportunity and working in a transformative manner can these goals be satisfied. For example, one important goal of the Act is to support long-term infrastructure for a new economy. Simply returning to the state of the country in 2007 before the worst of the economic downturn began will not build a 21st century economy. Ensuring that the recovery is fair, equal, and equitable is crucial to creating quality jobs and careers, sustainable industries, and housing and transportation that fulfills unmet needs and build paths of mobility for all Americans.

The data necessary to measure equity and the expansion of opportunity in a specific project will frequently be available from existing sources. After identifying the relevant geographic area, agencies can draw first from existing federal, state, and municipal data, including Census data, to determine likely impact.¹ Important equity issues, the relevant questions that agencies should be asking about how ARRA projects impact those issues, and potential metrics and data sources to answer those questions are suggested below for five areas: 1) Economic Development (including any job creation across all sectors); 2) Health; 3) Education; 4) Housing; and 5) Transportation and Related Infrastructure.²

¹ Federal data that demonstrates access to opportunity is available on a wide range of issues. See The Opportunity Agenda, *The State of Opportunity 2009*, available at <http://opportunityagenda.org/stateofopportunity>.

² Some questions and potential metrics are informed in part by a day-long meeting on June 19, 2009 co-hosted by Center for American Progress, The Center for Social Inclusion, Economic Policy Institute, Good Jobs First, Institute for Policy Studies, Jobs With Justice, OMB Watch, and OpenTheGovernment.org. The meeting, "Promoting Equity Metrics in the Recovery Act," brought together groups from across the country working toward a fair and equitable recovery. For more information on the meeting, please visit <http://www.ombwatch.org/node/10088>.

Proposed Equity and Equal Opportunity Metrics for the Economic Recovery

Issue	Questions Asked	Potential Metrics/Data
Economic Development – Small Businesses and Jobs	Does the project encourage economic development of the affected communities by promoting small businesses and creating high-quality, community-accessible jobs?	
a. Job Quality and Support Systems	Are the jobs being created providing fair pay and benefits? Will the project create or include supportive opportunities shown to enable equal job participation by women?	<ul style="list-style-type: none"> ➤ Hours and wages ➤ Medical coverage ➤ Child care ➤ Family leave
b. Contracting Locally and Building Careers	Does the project have contracting rules that employ local residents and assist local small businesses? Do jobs provide pathways to careers and union membership for underrepresented populations?	<ul style="list-style-type: none"> ➤ Unionized contractors ➤ Project Labor agreements ➤ Workers' residence (by ZIP Code, at minimum) ➤ Rural v. Urban project distribution
c. Accessible Jobs	Are new jobs created within the affected communities and accessible to community residents? If the jobs created are not compatible with the skills of community residents, does the project create on-the-job training or apprenticeship positions for community residents?	<ul style="list-style-type: none"> ➤ Community Benefits Agreements ➤ Occupational data (supervisors v. non-supervisory) ➤ Job Training or apprenticeships (or existence of Project Labor agreement specifying job training/apprenticeships)
d. Revitalization	Does the project increase the number of vacant/unused properties, or does it utilize vacant property for purposes beneficial to the affected communities?	<ul style="list-style-type: none"> ➤ Community Benefit Agreements ➤ Persons suffering/at high risk of foreclosure employed by project
e. Equal Opportunity and Anti-Discrimination	Where required, does the project implement affirmative action in hiring or contract distribution, to help reform deep and/or abiding discrimination within industries or communities?	<ul style="list-style-type: none"> ➤ Affirmative action programs ➤ Disadvantaged Business Enterprises (Minority and Women Business Enterprises) ➤ Disaggregation of measures for Youthbuild, Job Corps, and WIA Youth Activities by race, ethnicity, gender, and disability
f. Non-Discrimination	Does the project provide equal, meaningful access to employment and services generated by the project to persons of all genders, races, ethnicities, and disability statuses?	<ul style="list-style-type: none"> ➤ EEO1 data ➤ Racial, gender, and disability distribution of project employees ➤ Job training/apprenticeship distribution by race, gender, and disability
g. Reducing Barriers to Mobility	Does the project include measures to ensure that the populations with the greatest barriers to upward mobility (i.e., under 200% FPL) have access to created jobs?	<ul style="list-style-type: none"> ➤ Low-income and below poverty level employees ➤ Job training/apprenticeship distribution by income
h. Rehabilitation and Recidivism Prevention	Does the project include measures or programs that reduce, rather than increase, arrest, incarceration, and recidivism?	<ul style="list-style-type: none"> ➤ Job training and job placement promoting rehabilitation and preventing recidivism

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Health	Does the project improve or lessen the opportunity for impacted residents and communities to live under healthy conditions?	
a. Access to health care services	Will the project increase or decrease access to primary care for underserved and vulnerable populations?	➤ Health Resources and Service Administration's Index of Medical Underservice ³
b. Nutrition	Will the project increase or decrease the percentage of adults able to conform to federal dietary guidelines as measured by federally collected data?	➤ Institute of Medicine's State of USA Health Indicators ⁴
c. Physically Unhealthy Days	Will the project decrease or increase the number of physically unhealthy days experienced by residents?	➤ CDC Physically Unhealthy Days ⁵
d. Environmental Exposure	Will the project entail environmental hazards or clean-up efforts?	➤ Environmental Impact Statements
e. Reducing Barriers to Mobility	Where the project creates new services, does the project include measures to ensure that the populations with the greatest barriers to upward mobility (i.e., under 200% FPL) have access to the health care created?	➤ Income and poverty rates of populations served by new services, facilities
f. Cultural and Linguistic Access	Are the projects' benefits, services, and opportunities culturally and linguistically accessible?	➤ Office of Minority Health's Culturally and Linguistically Appropriate Services (CLAS) standards ⁶
g. Equal Opportunity and Anti-Discrimination	Does the project address persistent racial, ethnic, and linguistic disparities in both access to and quality of health care?	➤ Quality of care data disaggregated by race, ethnicity, and language ➤ Quality-improvement programs tied to reduction of disparities

³ Health Resources & Servs. Admin., U.S. Dep't of Health & Human Servs., HPSA Designation, <http://bhpr.hrsa.gov/shortage/muaguide.htm>.

⁴ Institute of Medicine, State of U.S.A. Health Indicators, <http://www.iom.edu/CMS/3793/55146/60706.aspx>.

⁵ Ctrs. for Disease Control & Prevention, *Health-Related Quality of Life – Prevalence Data, Mean Physically Unhealthy Days*, available at <http://apps.nccd.cdc.gov/HROOL/TrendV.asp?State=1&Category=1&Measure=2>.

⁶ Office of Minority Health, U.S. Dep't of Health & Human Servs., National Standards, <http://www.omhrc.gov/templates/browse.aspx?lvl=2&lvlID=15>.

Issue	Questions Asked	Potential Metrics/Data
Education	Does the project improve or lessen the opportunity for affected residents and communities to access quality education and job training?	
a. K-12 classroom size, resources, graduation rate	Will the project improve or worsen the educational opportunity of students in the affected communities?	➤ State and Department of Education data on classroom size, school resources, and graduation rates (e.g., California School Accountability Report Card)
b. School Integration	Will school construction expansion or demolition increase or decrease school integration?	➤ Integration data from U.S. Census Bureau ⁷ and the Pew Hispanic Center ⁸
c. Higher education access	Will the project increase or decrease the number of residents likely to enroll and complete degree programs?	➤ National Center for Education Statistics' Integrated Postsecondary Education Data System ⁹
d. Apprenticeships and Job Training	Will the project create job training or apprenticeship opportunities within the affected communities?	➤ Project Labor Agreements and/or Community Benefit Agreements
e. Child care, daycare, and preschool	Will the project improve or worsen the ratio of childcare availability to the population of children in need of such care, considering also the projected population changes over the course of the project?	➤ Birthrate, current and projected ➤ Child care, daycare, and preschool availability
f. Reducing Barriers to Mobility	Where the project creates new services, does the project include measures to ensure that the populations with the greatest barriers to upward mobility (i.e., under 200% FPL) have access to the educational opportunities created?	➤ Income and poverty rates of populations served by new services, facilities
g. Equal Opportunity and Anti-Discrimination	Does the project address persistent racial, ethnic, and linguistic disparities in student performance and opportunity?	➤ Compliance with the Equal Educational Opportunities Act ➤ Graduation and drop-out rates by race, ethnicity, language

⁷ U.S. Census Bureau, Housing Patterns, http://www.census.gov/hhes/www/housing/housing_patterns/housing_patterns.html.

⁸ Pew Hispanic Center, *Racial and Ethnic Composition of Schools*, August 30, 2007, Table 1 available at <http://pewhispanic.org/files/reports/79.pdf>.

⁹ Nat'l Ctr. for Educ. Statistics, U.S. Dep't of Education, Integrated Postsecondary Education Data System, <http://nces.ed.gov/ipeds/>.

Issue	Questions Asked	Potential Metrics/Data
Housing	Does the project improve or lessen the opportunity for affected residents and communities to access stable, safe and quality housing? Does the project promote mobility and stable and secure asset-building by all families?	
a. Affordable housing	Are provisions for more affordable housing integrated into new project designs? Does the project include measures to ensure that the populations with the greatest barriers to upward mobility (i.e., under 200% FPL) have access to more quality housing?	<ul style="list-style-type: none"> ➤ Income and poverty rates of populations served by new housing ➤ Affordable housing units ➤ “Tacking-on” prevalence: where affordable housing developers tack on fees for utilities onto rent
b. Property Values and Rent Levels	Are measures included in the project to maintain stable property values and rent levels?	<ul style="list-style-type: none"> ➤ Concentration of “rent stress” in the community, of those renters paying over 30% of income on gross rent
c. Foreclosure Prevention	Does the project anticipate existing and potential foreclosures in the impacted community and integrate measures to assist those threatened by foreclosure?	<ul style="list-style-type: none"> ➤ Records of foreclosures ➤ Concentration of “mortgage stress” in the community, of those homeowners paying over 30% of income on their mortgages
d. Green Areas	Does the project increase or decrease the proximity of sizeable green areas (i.e., parks) to housing?	<ul style="list-style-type: none"> ➤ Green areas increased or decreased by project
e. Residential Integration	Does the project promote or discourage racially and socioeconomically integrated housing and neighborhoods, and does it include and enhance housing opportunity, mobility, and affirmative fair housing measures, as required under existing law?	<ul style="list-style-type: none"> ➤ U.S. Census Bureau¹⁰
f. Weatherization and energy efficiency	Does the project improve the energy efficiency of low income families?	<ul style="list-style-type: none"> ➤ Weatherization of affordable, subsidized and public housing units ➤ Energy efficiency of new affordable housing units
g. Access and ease of application	Are new housing units accessible to low income families and families of color, or do burdensome procedures disparately impact these communities?	<ul style="list-style-type: none"> ➤ Compliance with Fair Housing Act ➤ Use of background and credit checks ➤ Cost of application fees ➤ Acceptance of government housing vouchers

¹⁰ U.S. Census Bureau, Housing Patterns, *supra* note 23.

Issue	Questions Asked	Potential Metrics/Data
Transportation and Related Infrastructure	Does the project make it easier or more difficult for the impacted community to access benefits, services, and opportunities? Does the project integrate the affected communities with surrounding communities, not only in terms of racial, ethnic, and socioeconomic integration, but also in terms of bringing services essential to opportunity to isolated populations, and increasing the civic participation of the affected communities?	
a. Access to Opportunity	Does the project expand or restrict transportation paths utilized by the community impacted?	<ul style="list-style-type: none"> ➤ Distance to major transit hubs and average travel time to work ➤ “Opportunity Mapping” by the Kirwan Institute at Ohio State University¹¹
b. Transportation Modes	Does the project expand or restrict access to public transit, walkways, and bicycle paths? Does the project serve communities who are transit-dependent or with the greatest unmet needs?	<ul style="list-style-type: none"> ➤ Spending by transportation mode ➤ Miles of transit created or repaired by mode ➤ Population served by mode, disaggregated by income, race, and ethnicity
c. Public Transit maintenance and expansion	Does the project support public transportation programs that reliably and efficiently help people who live in areas of high unemployment to commute to areas of high job growth and opportunity?	<ul style="list-style-type: none"> ➤ Service hours preserved or expanded ➤ Service lines preserved or expanded ➤ Unemployment rates by impacted community
d. Economic Security	Does the project promote businesses or services that encourage or discourage economic security (e.g., banks vs. cash-checking facilities, bankruptcy prevention efforts such as credit counseling, and enforcement of fair lending laws)?	<ul style="list-style-type: none"> ➤ Distance of impacted housing to banks versus cash-checking institutions ➤ Compliance with Fair Credit Reporting Act and Home Mortgage Disclosure Act
e. Civic Participation	Does the project include measures to increase voter registration, enfranchisement, and civic participation of the community?	<ul style="list-style-type: none"> ➤ Compliance with NVRA (“Motor Voter Act”) to provide voter registration alongside social services ➤ Easily-accessible polling locations

¹¹ Opportunity Mapping, Kirwan Institute, Ohio State University, <http://kirwaninstitute.org/research/gismapping/opportunity-mapping/>.