

# Prosper Portland: Pivoting to Build an Inclusive and Equitable Economy

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# ENGAGING COMMUNITY FOR INCLUSIVE AND EQUITABLE PLACE-BASED ECONOMIC DEVELOPMENT: THE PORTLAND STORY

Portland, Oregon frequently appears on “best of” lists for livability, prosperity, and sustainability, yet residents experience disparate access to the qualities for which the city is known. In this case study, we’ll explore how the city’s economic development agency has engaged with the community to address this tension and potential relevance for other economic development organizations. We begin by exploring the agency’s roots and its evolution toward inclusive and equitable place-based economic development. Next we explore how the agency engages with the community to define and work towards that goal. We conclude with a consideration of lessons learned and implications.

## Evolution of an Economic Development Agency

Prosper Portland, the city’s economic development agency, evolved over its 60+ years from a limited focus on urban renewal to a portfolio of initiatives designed to cultivate inclusive economic prosperity. Certainly, the shift did not happen overnight nor without missteps along the way. In fact, as was the case in many cities, minority and low-income residents were frequently excluded from decision-making about their communities and from the wealth-building opportunities associated with the projects’ contracting, jobs, and property ownership. Critiques and recommendations regarding inclusive and economic development accumulated over the decades;<sup>1</sup> with time, the agency evolved its approach.

To understand Portland’s approach to inclusive and equitable economic development, it is important to consider its historical context. Like most US cities, Portland’s economy was built on systems of exclusion and inequity. The city exists on lands that were taken from Native peoples with devastating consequence to social, ecological, and economic

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<sup>1</sup> This includes, for example, detailed investigations of the agency in 1971 and 2005, disparity studies conducted in 1995 and 2009, and local efforts to promote equitable development (e.g., the Coalition for Livable Future’s 2007 Regional Equity Atlas highlighted benefits and burdens of growth in the region; Portland State University’s Social Equity and Opportunity Forum worked with diverse public, private, and nonprofit stakeholders to explore new models of equitable development from 2007 to 2010; and the Construction and Apprentice Workforce Solutions (CAWS) alliance of construction industry stakeholders formed in 2005 to address systems solutions to meeting workforce shortages and diversifying the trades).

systems.<sup>2</sup> Exclusion was enshrined in the state’s constitution as “free negroes or mulattoes” were prohibited from being in the state, holding real estate, or making contracts.<sup>3</sup> Access to economic opportunity and property ownership was limited for people of color through policies and practices such as racial covenants, exclusionary zoning, and restricted access to loan products and insurance. Investment in parks, schools, roads, and other civic infrastructure bypassed certain neighborhoods, contributing to conditions that marked an area as ripe for “redevelopment.”

The Portland Development Commission<sup>4</sup> (PDC) was created in 1958 to address negative impacts of neighborhood decline and suburban out-migration -- impacts directly attributable to practices of exclusion and disinvestment (Wollner, Provo, and Schablitzky 2001; Prosper Portland 2019c, 9-10). Early initiatives by the PDC were driven by federal programs<sup>5</sup> and included both large scale “civic” projects as well as home and neighborhood rehabilitation. By 1969 substantive concerns about urban renewal in general and the PDC specifically prompted The City Club -- a bi-partisan civic organization -- to conduct an extensive investigation. Their report identified a number of issues including net loss of affordable housing, negative impacts of forced relocation, lack of appropriate engagement with citizens, inattention to social and economic needs, piecemeal actions disconnected from strategic goals and priorities, insufficient coordination with appropriate agencies -- often approached with a “check the box” attitude, inadequate systems of accountability, and a lack of representation on the Commission (City Club of Portland 1971). The report specifically noted the absence of “younger people, women, blacks and those with social service careers” (City Club of Portland 1971, 73). It also noted that “[t]he agency has too seldom taken human needs into consideration or responded adequately to citizen complaints” (City Club of Portland 1971, 72).

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<sup>2</sup> “The Portland Metro area rests on traditional village sites of the Multnomah, Wasco, Cowlitz, Kathlamet, Clackamas, Bands of Chinook, Tualatin, Kalapuya, Molalla, and many other tribes who made their homes along the Columbia River, creating communities and summer encampments to harvest and use the plentiful natural resources of the area.” *Leading with Tradition: Native American Community in the Portland Metropolitan Area*. n.d., p. 2; <https://nayapdx.org/wp-content/uploads/2017/12/Leading-with-Tradition.pdf>.

<sup>3</sup> The state constitution was not amended to remove this exclusion law until 1926, though had been rendered moot by federal law.

<sup>4</sup> The agency rebranded as Prosper Portland in 2017.

<sup>5</sup> These included, for example, the Federal Housing Act, Neighborhood Development Program (NDP), Community Renewal Program (CRP), and Model Cities Program.

In the 1990s, the agency expanded its urban renewal focus to explicitly address economic development. As one interviewee<sup>6</sup> noted: “The agency was set up as a redevelopment agency and economic development was not a priority. They were developers and had a reputation for excellence and coming in on time and under budget. But they did not invest in people or with community...There was a sense that ‘we know what is best for community; we are economic development specialists and we know how to make investments,’ yet they did not understand things like why people in areas that had been redlined did not have the same credit worthiness.”

In 2002 the agency issued an economic development strategy that considered the changing nature of the region’s economy, assessed Portland’s performance relative to peer cities, acknowledged the role of existing and small businesses in the economy, noted the interdependence between quality of life and economic development and identified issues and strategies pertaining to space, infrastructure, entrepreneurship, workforce, target industries, marketing and implementation. In 2005, another investigation of the PDC was conducted by the City Club, this time focusing on governance, structure, and accountability. Among the findings were a need for improved transparency and accountability, enhanced coordination with other bureaus, and public participation strategies that yield an ability to meaningfully influence decisions (City Club of Portland 2005). In addition, the report concluded that while the agency had made decisive and positive contributions to the redevelopment of downtown, it had been “less effective at using the tools of urban renewal in outlying areas” (City Club of Portland 2005, 41).

A new Economic Development Strategy was issued in 2009 -- this time centering sustainability and highlighting family wage jobs and wealth creation, thriving neighborhoods and small businesses, cross-sector collaboration, innovation, and traded sector competitiveness in four target clusters (clean tech and sustainable industries, activewear, software, and advanced manufacturing) (Portland Development Commission 2009). In 2011, the agency issued a five-year Neighborhood Economic Development Strategy in order to add depth and direction to the Neighborhood Business Vitality component of its 2009 Strategy and to remedy inequitable access to economic opportunity and neighborhood vitality in the city.

It is through the Neighborhood Economic Development (NED) Strategy that the contours of inclusive, equitable place-based economic development begin to appear. The 2011

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<sup>6</sup> Interviewees are listed at the conclusion of this document. Comments are not ascribed to specific individuals as interviewees were guaranteed anonymity in order to promote candor.

NED strategy defined community-driven neighborhood economic development and grounded the approach in an “assumption that communities and CBOs are best suited to drive the process of neighborhood economic development in a way that addresses the unique conditions of each neighborhood or community” (Portland Development Commission 2011, 11–12). Further, the strategy suggested that neighborhood economic development begin with conversations among stakeholders, and that implementation strategies take “a holistic approach to building capacity of people, place, and business” (Portland Development Commission 2011, 12). The NED Strategy called for a focus on communities of color and priority neighborhoods,<sup>7</sup> cross-sector collaboration, and identification of resources for implementation (Portland Development Commission 2011, 2). The strategy was informed by extensive stakeholder engagement and a NED Leadership Group was formed to guide its implementation. Performance measures were defined, with a commitment to disaggregate data by race, ethnicity, and geography. This approach was supported by the PDC Board’s adoption of an Equity Policy in 2013 that provided direction in three areas: internal practices, management of programs and investments, and external collaboration and accountability (Portland Development Commission 2013).

PDC’s turn toward inclusive place-based economic development continued with its 2015-2020 Strategic Plan. Here the agency committed to “more deeply integrate its job-creation, place-making, and economic opportunity work to realize benefits for all Portlanders,” especially communities of color and those historically underserved (Portland Development Commission n.d.c., 4). Five objectives of the plan correspond to increasing the capacities of people, place, business, and governance/policy, as described in the main white paper for this project, [Reflecting Community Priorities in Economic Development Practices](#), through:

- **People and Business:** Leverage and maintain Portland’s economic competitiveness and create access to high quality employment by supporting traded sector business growth, access to new domestic and foreign markets, and connections for Portland residents to quality employment opportunities across both traded sector and local serving industries;
- **Business and Place:** Increase equitable opportunities by growing small and promising new business ventures, commercializing research, and supporting real

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<sup>7</sup> Defined as including neighborhoods experiencing lagging commercial investment and increased poverty, gentrification pressures, substantial change due to major public infrastructure improvements, or businesses at risk of losing ground to suburban or big box competitors (Portland Development Commission 2011a, 2).

estate ownership and development that fosters wealth creation within communities of color and low-income neighborhoods;

- **Place:** Strengthen Portland’s communities by striving to build and increase access to healthy, complete neighborhoods—those with essential goods and services, transportation options, connections to employment centers, and community and open spaces—throughout Portland;
- **Policy and Governance:** Align efforts by forming 21st century civic networks, institutions, and partnerships to address the most pressing barriers to prosperity and establish creative, effective, silo-busting solutions;
- **Policy and Governance:** Model the values of this plan and maintain PDC’s ability to be an agent of positive change in the city of Portland by operating an equitable, innovative, and financially sustainable agency (Portland Development Commission n.d.c., 10) .

Further, the strategic plan articulated a commitment to “new models for community engagement and decision-making that provide equal access and opportunity to PDC resources,” working with historically-disadvantaged communities to address structural disparities and create pathways for prosperity, cultivation of authentic relations and mutual accountability, and transformation into “an anti-racist,<sup>8</sup> multicultural organization” (Portland Development Commission n.d.c, 22). In 2018, the agency issued a Ten Year Financial Sustainability Plan to address an upcoming decline of its primary funding tool (the sunset of urban renewal tax increment financing districts) as well as the pivot to human- and business-centered priorities that require more flexible financial tools (Prosper Portland 2018b, 3).

The agency’s capacity to implement inclusive and equitable economic development has been facilitated by its attention to organizational culture and practices. Equity Procedures were adopted in 2015 to inform investment management, workforce and business equity,<sup>9</sup> human resources,<sup>10</sup> community benefit, and community engagement (Portland Development Commission n.d.c). Updates in 2016 and 2017 affirmed the organization’s commitment to becoming an anti-racist organization and established both internal and

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<sup>8</sup> An “anti-racist” perspective means being aware of and committed to recognizing and replacing systems that create and perpetuate differential outcomes that can be predicted by skin color (race), whether intentional or not. See

[https://www.aesa.us/conferences/2013\\_ac\\_presentations/Continuum\\_AntiRacist.pdf](https://www.aesa.us/conferences/2013_ac_presentations/Continuum_AntiRacist.pdf) for more detail.

<sup>9</sup> Diversity of apprentice and journey level participation in PDC funded projects and diversity of professional, supplier, and construction contracts in PDC funded projects.

<sup>10</sup> Including strategies to achieve inclusive recruitment, retention, and promotion.

external councils to guide implementation and assess progress.<sup>11</sup> In 2017, the agency rebranded as Prosper Portland to reflect its changing priorities and practices. The organization deepened its work in 2018 and 2019, by engaging in intensive internal diversity training, hiring a full-time equity and inclusion program manager, and developing Cultural Agreements (to address the ways dominant culture contributes to exclusion) and Meeting Agreements (to encourage inclusive and productive meetings, internally and externally). Staff also generated an Equity Priorities and Strategies Plan to guide the work of individuals and teams.

In August 2019, Prosper Portland made its commitments more visible by publishing its Equity Framework (Prosper Portland 2019c). The Framework includes a history of the organization and its equity journey, equity concepts and definitions, and its Equity Statement, Equity Model for Change, Cultural Agreements, and Meeting Agreements. The Framework is suggested to be an evolving and usable resource to guide the organization in achieving its objectives. Said Executive Director Kimberly Branam, “Advancing racial equity is essential work for each of us. Prosper Portland must continue to transform how we engage, how we partner, how we invest, and how we change our internal culture to ensure we are creating equitable opportunities and impacts through our efforts” (Prosper Portland 2019c, 3).

In early 2020 the agency’s commitments to engagement and equity were put to the test as it grappled with the devastating impacts of the COVID-19 pandemic and societal reckoning with systemic racism unleashed by a rapid sequence of public attention to murders and endangerment of Black lives.<sup>12</sup> As noted below, the agency’s response centered equity and engaged the community in setting priorities and defining responses. Although available resources were nowhere near enough to meet the need, the agency was able to rapidly deploy an equity-centered response. This success was made possible by the organization’s solid foundation of equity commitments and productive working relationships within the bureau and across the City and other agencies. Said one interviewee, “had Kimberly not set up the leadership team that she had set up, who knows what it would have looked like now. They invested considerable money to have shared language, not just teams and staff internally but also partners too. That investment shows commitment. And that work positioned the organization to be fast in

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<sup>11</sup> The Equity Council guides internal implementation of the policy and the Council for Economic and Racial Equity is designed to provide implementation guidance and assess progress of the policy.

<sup>12</sup> The murder of George Floyd by Minneapolis police in May was catalytic, a tipping point on the heels of a sequence of events that garnered public attention including (but not limited to) the killing of Ahmaud Arbery (an unarmed jogger), the killing of Breonna Taylor (an unarmed emergency medical technician asleep in her apartment), and the threatening of Christian Cooper (an unarmed bird watcher).

responding in an intentional and thoughtful way and to center equity and BIPOC<sup>13</sup> communities in a legally defensible way. Usually in a crisis equity goes out the window; here Prosper’s doubling down.”

## Engaging Community in Inclusive and Equitable Place-Based Economic Development

The section above provided an overview of Prosper Portland’s evolution toward inclusive and equitable place-based economic development. In this section we’ll consider how the agency engages with community to define priorities, design and implement programs, and assess progress towards its goals. We’ll do so by exploring a range of agency efforts including the Neighborhood Prosperity Initiative, Inclusive Business Resource Network, Council for Economic and Racial Equity, Benefit Agreements, Workforce and Contractor Development, and Budgeting and Evaluation. An exhaustive review of all agency efforts regarding inclusive and equitable development is beyond the scope of this study. Rather, insights into the agency’s community engagement efforts and lessons learned are gained by considering a sample of programs that address people, place, businesses, and governance relevant to inclusive and equitable place based development.

### Neighborhood Prosperity Initiative

Prosper Portland’s Neighborhood Prosperity Initiative (NPI) is a network of seven “mini-urban renewal districts” that was created in 2012.<sup>14</sup> The Initiative was an outgrowth of the agency’s 2011 Neighborhood Economic Development Strategy and was informed by the NED Leadership Group. Potential NPIs were identified based on criteria that included not being in an existing urban renewal area, lagging commercial investment and lower income/higher poverty rates, a concentration of minority-owned and/or serving businesses, a concentration of locally-owned businesses, commercial zoning/use, and business/community organization capacity. The final selection was based on milestones met (participation, letters of support, fundraising), community interest and commitment, the presence of a cross-sector collaborative entity to oversee investments, and a plan for goals, activities, and benchmarks of success. The program launched with investments in leadership training and district development.

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<sup>13</sup> Black, Indigenous, and People of Color (BIPOC).

<sup>14</sup> The NPIs include Cully Blvd Alliance, Division Midway Alliance, Historic Parkrose, Jade District, Our 42nd Avenue, Rosewood Initiative, and St. Johns Center for Opportunity.

Each NPI is guided by a community-based board and led by a district manager that they hire. Prosper Portland provides technical assistance, training, and financial contributions toward administration and operations, promotions and branding, and district improvements. Each NPI has its own programs but there are also similarities such as the provision of workforce navigation, storefront improvement, and business support. The district managers connect with businesses on a regular basis and engage in neighborhood community efforts. The NPI staff are intimately involved with the businesses, residents, and organizations; as one interviewee noted, “that is their beat.” They help address issues as they arise and support capacity building of organizations.

The NPIs operate as and are referred to as a network (NPN), meeting monthly to share ideas and resources. This Network is viewed as a valuable asset. Said one interviewee, “I don’t consider the other NPIs a competitor or threat. They are thought partners, we share drafts and even HR practices...They (staff) have created a safe and strong network that I am grateful for.” The NPI’s partnership with Prosper is viewed favorably and agency staff are viewed as a dedicated and helpful resource. Said one interviewee, “the NPI liaison provides a lot of benefit, contributing as though they were part of the staff -- it’s not just a once a year report. They literally are involved -- attending board meetings, volunteering, joining clean-ups. It’s a team.”

The NPIs are viewed as a positive example of community-led development. Said one interviewee, “They (Prosper) are making sure that culturally appropriate organizations are doing the work; they are supporting that. That is effective in my mind. If Prosper was delivering assistance from a fancy downtown building it would be different: Accessibility starts in community. This is place based and run by and in the community. They (Prosper) let them (NPIs) decide for themselves the priorities but also are there as a thought partner, resource, network, and advocacy for bringing attention and visibility and resources to the Network...I appreciate that we make our decisions as our own organization. It feels great to get the support but be independent to make your own decisions. And there is more impact when you are a network.”

Baseline funding is provided to the NPIs, however, it was noted that the level of funding is not adequate to the task. “The funding from Prosper barely keeps the doors open...You can’t really expect one person, one staff to be shouldering everything and serving a whole district. There needs to be more capacity -- money, staff, and training. And enough to attract and retain staff. Start with making sure there is enough for benefits and hours.” The Neighborhood Prosperity Initiative was designed to last ten years and become self-sufficient; but as that horizon approaches it is clear the need remains. As

one interviewee noted, “The model is really strong and I’ve seen it work. But that doesn't mean it's done.” Efforts are underway to consider a continuity plan for future funding and support. A new neighborhood-based tax increment finance model is being explored and the NPIs will be weighing in. There’s a sense by participants that innovative ways to fund the work might exist but that the organizations haven’t had the bandwidth to think about that.<sup>15</sup> There also is a sense that the agency should consider its overall budgeting and find a way to dedicate funding to these priority programs. Suggested one interviewee, Prosper could “conduct a big review of what we have done, where we are, where we want to go and go all in on the Network.”

Another concern pertains to the ways physical improvements being made in the districts can contribute to displacement. Said one interviewee, “We are improving properties but there is a risk that improving the property will lead to a rent increase in 2-3 years. Who is building more wealth? The businesses are often not the property owners and the property owners often are not people of color. Some business owners have been able to leverage the property improvements when negotiating lease terms but in other cases the property owners won’t consider that.” Said another interviewee, “we did not anticipate the scale and speed that (displacement) would happen.” It was suggested that additional efforts are needed to increase property ownership by people of color and by entities that provide long term affordability to tenants. Anti-displacement and wealth creation are priorities that have been identified by the community, agency, and City, and are being addressed through a variety of efforts,<sup>16</sup> however, there is a sense that achievement of those goals would be facilitated by a more integrated and better resourced approach.<sup>17</sup>

Regarding accountability, one interviewee noted that “Prosper’s strategy reflects our goals. There is the same equity lens -- whether writing grants, who gets served, or board composition. Every year we report on our diversity and equity-based work. It helps provide a check and balance. That accountability piece.” Current metrics for the program

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<sup>15</sup> The point here is that organizations are infrequently resourced to engage in “big picture thinking” and strategizing as opposed to delivery of specific products or services.

<sup>16</sup> These include, but are not limited to, cultivation of construction business opportunities for under-represented firms, affordable commercial tenancing, property improvement grants, community livability grants, business district support, and helping individuals and businesses navigate to resources that support career or business development. It is not clear, however, whether or how the broad number of initiatives are integrated or complementary to each other.

<sup>17</sup> The Mayor recently called for the creation of an Anti-Displacement Action Plan and Task Force. The Task Force will be comprised of community members and cross-bureau City leadership and will address housing and commercial displacement <https://www.portland.gov/bps/adap>. The effort is led by the Bureau of Planning and Sustainability though Prosper will be engaged. This effort is just getting underway and it is too early to know how this will impact the agency’s work with the community.

track volunteer hours, leveraged funds, net number of businesses<sup>18</sup>, number of technical assistance hours to business district associations, and the number of projects funded (Prosper Portland 2020b, 17–18). There is interest in refining these metrics. Said one interviewee, “For me, community trust is a huge progress in success, but for the agency it might be jobs or dollars. For equity and culturally specific economic development you may not be able to apply the same impact measurement.” Another interviewee echoed the need to revisit and co-create the current goals to ensure they meet community goals. An effort to revamp the NPI performance measures was underway at the time of this research; however, the process was put on hold as attention shifted to more immediate priorities associated with the COVID-19 emergency.

Here, and regarding other initiatives, interviewees cautioned that this is a long game. Said one, “I would say think long term. Really, really long term. This takes a long time. It can be easy for folks to want to see things happen in a year or two, but it really takes a while to make progress. But once you do, it’s like a snowball effect, you’re pushing and then gain momentum. Be patient, be a long-term thinker. We’re nowhere near; it is a long-term transformational process.”

### Inclusive Business Resource Network

Launched in 2017, the Inclusive Business Resource Network (IBRN) comprises 17 organizations contracted by Prosper Portland to provide business technical assistance to underrepresented and culturally specific entrepreneurs and businesses. The initiative evolved from the agency’s small business technical assistance program in an effort to more effectively serve diverse businesses from a variety of industries and at various stages of business development. The IBRN shifts attention from specific technical service providers to the end-user’s journey and their touchpoints across the entrepreneurial ecosystem.

Prosper Portland convenes the Network members as a community of practice that meets monthly to share ideas, resources, recognitions, and lessons. Work is also accomplished through a number of committees; for example, marketing, outcomes, and equity. The Network is viewed as welcoming and community driven, with that outcome attributed to the efforts of Prosper’s team. Cultivating a collaborative culture and sense of community was no small feat given that the organizations were working in isolation and often in competition with each other.

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<sup>18</sup> New businesses in the distinct minus closures.

A key task of the IBRN was the development of shared metrics and use of a shared reporting platform. Previously, the structure of the small business program did not yield an effective user experience for businesses and the focus on reporting outputs did not produce meaningful insights regarding outcomes for businesses. Now, as a learning community and network, member organizations are moving from a zero sum, siloed mentality to a collaborative and customer-centric approach. Said one interviewee, “you can see if your client has been served by another agency; there is transparent communication. For example, I might be offering a client market research and can see that they are getting legal help from someone else. Each is reporting on progress and challenges -- and can put a note on that.” The reporting system was designed in collaboration with the network members and the program iterates based on feedback loops and outcome-driven data. This includes process measures about the Network (e.g., participation in the network helped them be a better business advisor), output measures (e.g., number of entrepreneurs served by demographic), and impact measures (e.g., business performance) (Prosper Portland 2018a).

The IBRN is viewed as successful for uniting community-based service providers in a shared goal and reducing turf wars. In addition, there is a sense that Prosper is responsive to supporting network members to address their needs if they don’t meet the standards, instead of abandoning the organization. Rather than cutting the member, Prosper Portland focuses on building their capacity. At the same time, while the level of competition between service providers has been reduced, concern was expressed by one interviewee about potential comparisons and competition as “good performance” might be viewed differently depending on context.

The level of integration with other agency programs varies somewhat depending on the program and community group. For example, one interviewee noted, “our NPI benefits from the IBRN; I have clients that are a fit for different programs, and I can see who is a good fit and refer them.” Said another, “I feel like we have not been able to access some of the other Prosper departments. It is a large agency and we are in this one line and haven’t been able to access those other lines. Some of that is where our community members are -- they may not be ready for a storefront, an affordable retail opportunity, or a global market opportunity -- but some of it may be about lanes.”

Within the agency, integration is emerging between the workforce and contractor development efforts and the IBRN. To address community feedback regarding barriers to contractor development, the city created the Community Opportunities and Enhancement Program (COEP) which provides grants to community-based partners to

provide business technical assistance to minority, women, and disadvantaged business enterprise (DBE) businesses in the construction industry. COEP grant recipients were announced in July 2020 and those business technical assistance providers will be joining the IBRN.

### Benefit Agreements

Prosper Portland has two types of benefit agreement programs. Enterprise Zone Public Benefit Agreements are legally-binding contracts that allow eligible companies to receive tax abatements if specific standards and deliverables are met. Community Benefit Agreements have been defined for particularly sensitive development projects on a case by case basis.<sup>19</sup> The following considers the role of community engagement in the agency's benefit agreement efforts.

In 2017 Prosper Portland amended the boundaries and requirements of its Enterprise Zone (E-Zone) program (Masterman n.d.; Reed n.d.; Prosper Portland 2019b). Participants in the revised tax abatement program enter into Public Benefit Agreements (PBAs) that include elements consistent with inclusive placed based development, including minimum standards for compensation, career ladder programming, procurement of goods and services from local businesses – including businesses owned by people of color and located in low income communities, contribution to the Workforce Training and Business Development Fund (WTBDF) and Employee Support Fund (ESF), compliance with Prosper's workforce and contracting equity in construction, City cost of service fees, and equity actions. Depending on the size of the project, two to six additional public benefits are negotiated from a menu of options in the areas of jobs, partnerships, neighborhoods, prosperity, and equity. Community engagement in the creation of the public benefits included outreach to organizations of various sizes representing schools, community-based organizations, and businesses to learn about their needs and what they would consider to be helpful. The initial list of ideas was then narrowed and vetted. An annual performance review is required and corrective measures are defined, however, reports are not yet completed due to the timing of the program (i.e., the first agreements were signed in 2018, with the first tax liability due 2019). Staff are currently

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<sup>19</sup> Note that community benefits language also refers to agreements that apply to City of Portland public improvement contracts that utilize alternative contracting methods. These "community benefit agreements" are designed to increase contracting and workforce opportunities for historically underrepresented populations. For these contracts the City has defined requirements for Community Benefits Agreements (CBA) that apply to certain public improvement contracts in excess of \$25 million and Community Equity and Inclusion Plans (CEIP) that apply to certain public improvement contracts between \$10 million and \$25 million (City of Portland 2017).

compiling results, including how companies are adapting in the face of COVID-19 (e.g., how to provide school tours when closures and distancing requirements are in place).

In 2013, PDC announced its intention to sell a significant property in the heart of the African American community that was valued at \$2.9 million to an out-of-state real estate development company for \$500,000 (Quinton 2013.) The community came out in strong opposition including a letter to the Mayor and Prosper Portland that identified the proposed project's lack of alignment with community identified priorities and City commitments to address gentrification and displacement of the Black community (The Portland African American Leadership Forum n.d.). The community chastised the City for ignoring the input of numerous "community engagement" efforts. In response, the anchor tenant (Trader Joe's) pulled out and the agency worked with community members to address its concerns, including crafting a Community Benefit Agreement (CBA) for future development of the site. The CBA established an Implementation Monitoring and Accountability Committee (IMAC) that included subcommittees for retail tenancing, construction, and public art, workforce and contracting requirements, green building requirements, anchor tenant hiring requirements, provision of community space, provision of affordable tenancing, and strategies to secure products and services from and for the community (Portland Development Commission n.d.a; Moreland n.d.). Contracting goals were exceeded though apprentice utilization goals were not.<sup>20</sup> One interviewee noted that there appear to have been issues with tenancing and frustration at a lack of staff to fill the space. It does not appear that the IMAC continues to meet, nor that there has been any follow-up report on performance. It is not clear whether this is due to project completion or lapse in oversight and accountability.

The Broadway Corridor is a 34 acre once-in-a-generation development opportunity unfolding in the northwest of the city's center. The majority of the property is owned by Prosper Portland including a decommissioned 14 acre US Postal Service site that is jointly owned with the Portland Housing Bureau.<sup>21</sup> Project planning is guided by a 41 member Steering Committee and includes an extensive public engagement process. In 2015 the Healthy Communities Coalition PDX, which formed in 2015, worked to ensure that benefits of the project would include good jobs, affordable housing, disability justice, small business opportunities, transit justice, environmental stewardship, and equity for

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<sup>20</sup> See project website:

<https://prosperportland.us/portfolio-items/martin-luther-king-jr-blvd-alberta-st-development-project/>.

<sup>21</sup> See project website: <https://www.broadwaycorridorpx.com/about-us>.

BIPOC and working class communities.<sup>22</sup> Members of the Coalition participated in the extensive visioning and community engagement process and began negotiating a legally-binding CBA in 2019.

In June 2020 negotiations for the Broadway Corridor broke down and a letter was sent to the Mayor and City Council requesting a meeting. Factors contributing to the breakdown included disagreement about provision of health care benefits for construction workers on the project, clear oversight and accountability mechanism, and payment of prevailing wage for all construction on the project (Healthy Communities Coalition June 24, 2020). By September a positive resolution was achieved and the Mayor and City Council approved the agreement (Branam 2020; Bach 2020; Prosper Portland 2020b). The agreed to solution is two interlocking agreements: a community benefit agreement signed by Prosper Portland and the Healthy Communities Coalition, and a disposition and development agreement (DDA) signed by Prosper Portland and the developer. This arrangement was struck due to the unique nature of the development -- a multi-phase development occurring over decades with potentially multiple developers. Engagement in this effort will include an oversight committee which will focus on constructive problem solving and may provide stipends to members (Bach 2020). Accountability will occur in part through the project's phased acquisition as the agency determines whether or not to sell additional portions of the site to the developer.

In probing whether and how the community is engaged in benefit agreements, interviewee responses ranged from no opinion to cautious optimism. One interviewee suggested that the organization has room to grow with regards to their understanding of wealth building for workers and the community's role in that, and also suggested that oversight and compliance needs to be strengthened. They went on to say, "I recognize that Kimberly and leadership are trying to do something different. I give them credit for that; doing a CBA is a big deal. But sometimes they fall back on old habits. The intention to do something different is there, to be a different institution, but it is still some of the old guard and old ways of approaching development. And pitting small business and workers against each other. It feels like it is a false debate, fighting for crumbs when so much goes to the developer. I believe there are staff that want to do things differently, but the feeling is that there are barriers and walls. It seems that we need people in procurement and legal that can more constructively advance the work. I can't say that definitively, but I question whether they have some of the expertise regarding CBAs, the specialized law. So, maybe not opposition but unfamiliarity."

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<sup>22</sup> See Health Communities Coalition Broadway Corridor Campaign website: <https://healthycommunitiespdx.org/corridor-campaign/>

Benefit agreements are new territory – for the agency, community, businesses and developers. Engagement has varied with the type of agreement: communities have taken the lead in the CBAs, fighting to ensure that major developments address their concerns and interests, while businesses take the lead with PBAs, selectively engaging with the community in order to deliver benefits that are negotiated with Prosper Portland. Both benefit approaches require appropriate investment to develop the relationships, skills and compliance approaches necessary to succeed.

### Council for Economic and Racial Equity

The Council for Economic and Racial Equity (CERE) was created in 2017 to help “ensure racial and economic equity are the primary lenses used in Prosper Portland’s policies, programs, projects, and strategies to advance equitable outcomes” (Norwood n.d.a). The group had begun to experience some attrition by 2019; with the onset of the COVID pandemic and Black Lives Matter things came to head. There was frustration with what were perceived as “micro-progressions” rather than impactful wins, and a growing realization of the physical and mental health toll that the work was taking. In July 2020, despite a range of views within the group, spanning from conservative to progressive to radical, members navigated difficult conversations and sent a letter to Prosper’s Commissioners and Executive Director identifying specific concerns and requests.

In their July 2020 letter, CERE members noted that they felt they had a disempowered input role and expressed frustration regarding a perceived lack of true partnership and engagement, institutional barriers to economic and racial equity, and lack of oversight, transparency, and accountability (Council for Economic and Racial Equity July, 24, 2020). A meeting was requested with the Prosper Board, Mayor, and City Commissioners along with “immediate asks” to strengthen CERE’s relationship with the Commission, strengthen commitment to BIPOC staff, strengthen CERE’s charge and oversight on equity and economic development, provide reparations for historic redlining and displacement, and promote regenerative wealth building models that center BIPOC communities. A meeting was held with CERE members and on September 4th a response was sent from the Board Chair, Executive Director, and Mayor’s Director of Strategic Initiatives. The letter includes an appreciation of the Committee’s work, acknowledgement of the organization’s impact on communities, recognition of traumas and harms, and responses to the five “immediate asks” (Cruz, Branam, and Alexander September 4, 2020). The letter notes that some items can be immediately addressed (e.g., Board Chair and Mayor’s Liaison attend CERE meetings, HR meeting with CERE to

address BIPOC relations), while others will require a deeper conversation (e.g., strengthened oversight role, agency reparations, new economic models).

What appears to be at play here is a lack of clarity or agreement regarding roles and responsibilities, compounded by a profound sense of urgency on the part of CERE members to make timely and substantive impact. CERE members understand their role in advancing equity to include the authority to suggest significant programmatic changes and provide a strong hand in oversight, while the agency views the Council's role as advisory to staff and the governing board in a constellation of advisory and oversight committees. A full-day facilitated conversation with CERE members, a cross-section of staff, and one or two Commissioners has been suggested as a next step.

### Construction Workforce and Contractor Equity

Prosper Portland and the City have created numerous programs and policies to address workforce and contractor equity over the years – often in response to community pressure. Groups such as the Metropolitan Alliance for Workforce Equity (MAWE) and Construction Apprentice Workforce Solutions (CAWS) have been at the forefront of efforts to ensure that public investments bring jobs and prosperity to underrepresented populations. For example, MAWE developed a model Community Benefits Agreement (focused on workforce and contracting) to be applied to public projects and advocated for the city to pilot and then adopt that strategy (Barnard and Hood 2016; Haines 2019).

Addressing calls for more transparency, the agency began displaying progress toward business and workforce equity on Prosper-funded projects on a public dashboard (Norwood n.d.). The dashboard provides information on completed and in-progress projects, including apprentice utilization, female and minority participation in the workforce, and contracting with certified firms (DMWESB – Disadvantaged Business Enterprise, Minority Business Enterprise, Women Owned Business, and Emerging Small Business).

In 2018, the City joined with Metro (regional government) in funding a construction workforce market study to identify existing supply and demand for the Portland Metro region's construction workforce as well as barriers to achieving equity and diversity in that workforce (Worksystems, Inc. 2018; Estolano LeSar Advisors 2019). The City also signed on to the Construction Career Pathways Project (C2P2) -- a regional effort to address construction workforce equity (Metro 2019). Prosper Portland is an active participant in that effort. The collaborative has defined inclusion goals for public

ownership projects and is working to coordinate efforts to address issues such as pipeline development, reporting and accountability.

In 2019, the City created the Community Opportunities and Enhancement Program (COEP), a multi-bureau collaboration to support inclusive workforce and contracting opportunities (Prosper Portland n.d.b.). The program sets aside 1% of eligible costs on City-owned public improvement costs to fund grants to community-based organizations that deliver workforce development and business development assistance. Grantees delivering business assistance will join Prosper Portland's IBRN (described above).

Despite some progress toward equity goals, challenges remain. For example, an internal audit of the construction equity programs across City bureaus (not specific to Prosper Portland) found weak results and poor management in some areas, and a recent hate incident on a public ownership project highlighted the need to address culture and accountability (Pape and Friedman 2020; Gallivan 2020; McIntosh 2020; Metropolitan Alliance for Workplace Equity 2020). Community leaders continue to press for more substantive commitments and reforms in support of equity and inclusion. For example, a Regional Respectful Workplace Model Review Committee formed to address workplace culture as a core issue shaping recruitment and retention of diverse workers. They are sharing best practices regarding training programs and urging public owners, contractors, labor organizations and others to sign on to the "Safe from Hate Jobsite Culture Pledge." They and a broad coalition of groups are also working to hold the City and its contractors accountable for hate incidents on public-ownership projects. Momentum appears to be growing at the city and regional level for stronger and more coordinated efforts to foster inclusive and equitable workforce and contracting, with community engagement significantly shaping these initiatives.

## Budgeting

One of the primary forms of engagement in the budget process is through the Community Budget Committee (CBC)<sup>23</sup> – a group of approximately twenty stakeholders representing diverse geographies, communities, and sectors. Responding to CBC recommendations, Prosper staff implemented a number of changes to provide members a stronger understanding of program and budget trade-offs in order to more effectively engage in the process (Prosper Portland 2020b). This included shifting from two meetings per year to a year-long budget process and reaching out to constituents to hear their feedback on budget drafts.

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<sup>23</sup> Also referred to as the Budget Advisory Committee.

As noted earlier, the relationship between the CBC and CERE remains unclear -- at least to CERE members. Examples of input shaping budget decisions were cited in interviews though, as noted earlier, questions linger regarding the amount of money allocated to community-driven development and the process for making those decisions. The Committee expressed their desire for clarity regarding their role and frustration with providing significant time to the review and recommendation process in the previous year only to see changes made without explanation.

It is not clear to what degree community was engaged in developing the agency's Ten Year Financial Sustainability Plan (created in response to a looming decline in tax increment financing associated with sunseting urban renewal areas), though the focus on equity and people and business centered development is consistent with community priorities.

### Pandemic Response

Prosper Portland is the lead agency for the city's cross-bureau, collaborative COVID-19 Economic Relief and Recovery Response composed of three economic impact response teams. The Economic Recovery Task Force is composed of nearly 100 diverse leaders from business, community, foundation, labor, public, and workforce organizations.<sup>24</sup> Work Groups comprised of Task Force members and other interested community members provide feedback and recommendations on specific topic areas. The initial Work Groups identified by the Task Force were formed to address urgent and actionable issues including leading with an equity and vulnerability lens, commercial evictions, digital divide, displaced workers ineligible for unemployment insurance, and city policies impacting local businesses, nonprofits and the arts, and permitting and construction. Listening sessions with the community were held to identify challenges and recommendations (e.g., Prosper Portland 2020d). The city's equity tools and frameworks were applied to identify vulnerable populations and prioritize their needs.<sup>25</sup> Work Group reporting on efforts has included accomplishments (e.g., number of computers distributed) as well as equity priorities and recommendations (e.g., population to prioritize) and lessons learned are applied along the way (e.g., Prosper Portland 2020c).

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<sup>24</sup> See Prosper Portland Economic Recovery website:

<https://prosperportland.us/get-involved/covid-19-economic-impact-intervention-response/>

<sup>25</sup> Links to these tools include: <https://prosperportland.us/wp-content/uploads/2020/05/COVID-Equity-Data.pdf>  
<https://prosperportland.us/wp-content/uploads/2020/05/Equity-Vulnerability-Lens-High-Level-Questions.pdf>  
<https://prosperportland.us/wp-content/uploads/2020/04/Equity-Vulnerability-Lens.pdf>

The Small Business Relief Fund provides an example of how the commitment to center equity and engage with community has manifested in programming and reporting.<sup>26</sup> The agency’s public dashboard shares demographic information about the Small Business Relief Fund Grants including the number of eligible applicants, grants awarded, awards by race/ethnicity, gender identity, geography, other identities (e.g., veteran, LGBTQ).<sup>27</sup> The breakdown is provided by number of grants and grant amounts, and also includes an aggregate number for women of color (responding to concerns that the figures for percent women and percent people of color do not convey whether women of color are receiving assistance). Commitments to serve under-represented and vulnerable populations were met, with people of color receiving approximately 90% of the grants and funding; 52% of awards were to women of color and about half went to priority geographies of North/Northeast Portland and East Portland.

## Evaluation

Measures of success for the 2015-2020 Strategic Plan were informed by a stakeholder advisory committee (Portland Development Commission 2015a). The agency’s 2018 Ten Year Financial Sustainability Plan includes a report on outcomes from fiscal year 2011-2012 to 2016-2017 and notes that “Accomplishments are measured against such markers as job growth, numbers of businesses assisted, service to populations of color, investment capital for early-stage companies, export levels, unemployment rates and new business licenses” (Prosper Portland 2018b). A Strategic Plan status report was issued in 2019 that includes information on actions for each of the five objectives as well as data for thirteen of the eighteen performance measures (Prosper Portland 2019a, 31–33). The five objectives include neighborhoods, jobs, prosperity, partnership, and equitable and financially sustainable agency. Each measure is identified as supporting one or more objective (e.g., “prosperous household” is measured as the increase in percent of households at or above self-sufficiency applies to all five objectives while “complete neighborhoods measured as percent of Portland households living in a complete neighborhoods” is identified only with the neighborhoods objective). A baseline and target are identified for each measure, and the report provides a progress update thirteen of the eighteen. For example, the measure “new middle wage jobs in East Portland” is defined as creating new middle wage jobs in East Portland at a rate comparable to or greater than Multnomah County as a whole. The baseline rate is 7% for East Portland and 9% for Multnomah County, the target is equal or greater, and the update is 7.8% and 6.9% respectively. The agency’s 2020-2021 budget request includes

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<sup>26</sup> <https://prosperportland.us/portfolio-items/portland-small-business-relief-fund/>

<sup>27</sup> <https://prosperportland.us/prosper-portland-awards-1-million-in-small-business-relief-grants-data/>.

one of the most accessible compilations of evaluation information. A description of each program is provided along with goals, and measures (Prosper Portland 2020b).

A 2016-2017 report by the City Budget Office raised questions about the agency's performance measures, noting that they include specific items that can be directly linked to programs as well as broad measures that are informed by macroeconomic factors and which the organization may have, at best, an indirect effect (Harwood, Eden, and Beliduboset n.d., 88) This point was echoed in the 2019 strategic plan status update as the report notes that the metrics defined are reflective not only of the agency's efforts but those of the broader community. Concerns about metrics were also raised by the Community Budget Committee, with a recommendation that "the agency continue to develop measurable, human-focused outcomes that both convey the impact of the work and provide greater ease in comparing different activities and programs" (Prosper Portland 2020b, 1). The city is in the process of revisiting performance measures for staff and programs which may facilitate this issue being resolved in the not too distant future.

While performance measures are created for specific programs, this information is not consistently available to the public. For example, the IBRN progress report is posted online, as is information about workforce and contractor equity on agency construction projects and Small Business Relief Fund grants, while information about performance of existing CBAs, E-zones, and the NPIs are not easily found online.<sup>28</sup> Overall, the community's role in defining and utilizing agency performance measures is not clear. As noted earlier, notable exceptions include the workforce and contractor equity dashboard, Small Business Relief Fund grants, and the Inclusive Business Resource Network program. The IBRN program is a particularly illustrative example of engagement in the development and use of performance measures. Members of the Network helped to develop the program's outcome goals and weigh in on trends and gaps in the data. Findings are used to make programmatic decisions -- for example, modifying areas of focus or working with the Revenue Bureau to address an identified issue with the business license process. In addition, Network members and entrepreneurs served through the IBRN are surveyed about their experience and that information is used to inform programming.

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<sup>28</sup> Of note, the agency's budget request states: "Each of the Strategic Plan goals has quantitative and qualitative data associated with measuring the outcomes and to monitor progress. Most of the goals and reporting are disaggregated by demographic information to ensure that equitable outcomes are monitored and achieved. Data are captured monthly, quarterly or annually, as appropriate, and reported to Prosper Portland's Board, posted on the agency's website, and described in each Program Offer being submitted as part of the FY 2020-21 Requested Budget" (Prosper Portland 2020b, 71).

## INSIGHTS AND LESSONS LEARNED

Portland's 2015-2020 strategy for inclusive place-based economic development called on the organization to "establish new models for community engagement and decision-making that provide equal access and opportunity to Prosper Portland resources, regardless of level of wealth or influence." Through this case we have explored what engagement looks like in practice and what lessons there may be for other jurisdictions seeking to build healthy and prosperous communities while remedying stark disparities and legacies of exclusion.

This research began with a question -- how does Prosper Portland engage the community to determine priorities, design and implement policies and programs to respond to priorities, and evaluate and reconcile efforts. The answer is, "it depends." As noted earlier, this case does not provide an exhaustive review of every engagement and initiative; what it does do is examine engagement across a range of programs to identify key themes and lessons learned. This exploration has brought forth promising examples of collaboration as well stories of frustration over business-as-usual tactics that don't meaningfully engage with community or deliver on promises.

Much of the agency's work focuses on inclusive and equitable place-based economic development, with programs and policies reflecting a shift in geographic and demographic priorities. These shifts, it was noted, too often came only after significant community leadership and activism. Said one interviewee, "What I hear from community is that Prosper does its best working with the community when there is the squeaky wheel and secured funding. Look at the Mercado, June Key Delta, and Verde's brownfield work. Those became prize projects for Prosper but it started out different." It is not clear how much of this sentiment reflects on the agency's prior way of doing business and whether new modes of engagement will be sufficient to the agency's goals.

"Cautious optimism" was an overarching theme in our interviews. Pivots have happened and there has been strong progress in some areas, but there are still misses and the level of investment and involvement does not match the need. Said one interviewee, "It's a slow process. They are moving in the right direction. I would love to see continued strides in what they are trying to do; deeper investments in culturally specific and BIPOC communities." There is a sense that "intentions are good" but the scale, structures, resources, and processes recreate the status quo.

For programs such as the IBRN and NPI, the sense is that the community is meaningfully engaged in defining priorities, designing programs, and evaluating and responding to

findings. However, even there, concerns were expressed about impact given the lack of resources. Said one interviewee, “The limited success goes nowhere near satisfying the need; especially at this time. We’re at a point of seminal change. We need to keep building.” Said, another, “I believe the intent is real. I’m appreciative of the on-the-ground staff. I’m cautiously optimistic. At the same time significant issues remain.” Said another, “I’m really impressed and also see there could be more.”

The changes that have taken place are in large part attributable to the agency’s leadership and investments in organizational culture change. As noted earlier, the agency has publicly owned the mistakes of its past and invested in building its understanding and capacity regarding equity and anti-racism. This has included training, staff development, changes to work plans and performance metrics, and the creation of cultural agreements and meeting agreements. Said one interviewee, “Change is difficult and slow, especially when dealing with a big entrenched bureaucracy. With Kimberly as Executive Director, the agency has been wanting to pivot. I applaud her for bringing a diverse leadership team that has worked with community. There have been good and welcome changes. As it plays out on the ground -- there has been some progress -- committees are more representative of the community and the community is being heard more. There has been good progress *and* there is room for growth.”

Specific observations and recommendations regarding engagement were identified. One pertains to the issue of compensation. As one interviewee noted, “Yes, there are several committees and councils; they (Prosper) are being good about inviting people to participate and being intentional about who is in the room. But I wish agencies were more comfortable to fund the time to be involved in those things. I could be in meetings and advisory groups all day and not have any of my time covered. They need to fund our engagement.” A second pertains to the need for clear parameters when seeking community input. Observed one interviewee, “as the agency found themselves facing critiques it responded by saying ‘let’s do what the community wants to do’ and of course that doesn't work without being clear about what is feasible and figuring out together what does and doesn’t make sense and coming to agreement...They come in and say ‘tell us what you want’ as opposed to ‘here are the things we can do.’” Without those parameters the community is often left feeling frustrated as visions expressed are not manifest. A third pertains to the need for better clarity about the purpose and desired outcomes of specific committees and engagements, the relationship to other committees and processes, the role of the members or participants and what they are empowered to do (e.g., input, decisions). Said one interviewee, “it seems basic but it is often a huge misstep in these processes. Institutions like Prosper need to know how to effectively set

the table for community to effectively engage. That includes ensuring there are shared definitions and an ability to talk through things together to get to alignment. If the table is not properly set, there is frustration.“

The importance of relationships was highlighted in many conversations; negative examples included decisions made without the involvement of key stakeholders or resources allocated to those with connections, while positive examples included network members “rowing in the same direction” and strengthening of boards and capacity as community groups grew their circle of connections. The importance of such bridging capital should not be underestimated. Trust and higher quality outcomes are fostered when relationships are cultivated and flows of information and decision-making are shared.

The agency has identified inclusive place-based economic development as a priority and made changes to operations and programs in support of that goal. The community has been engaged in defining, implementing, and assessing priorities to various degrees. There is cautious optimism about these efforts and a sense to the work will need to deepen and extend if success is to be achieved. For organizations that share this aspiration and are seeking lessons learned, the following may be instructive.

### Overarching Lessons from Portland within the Inclusive and Equitable Place-based Economic Development Framework

The following considers lessons learned within the research framework laid out in the project’s main report, *Reflecting Community Priorities in Economic Development Practices* (Hackler and Harpel 2020). However, two overarching lessons are central to Portland’s story.

#### Understand and own the history.

To effectively engage the community in defining, designing, and evaluating priorities it is critical to understand the agency’s history with the community -- including the role it played in creating disparate conditions and why levels of trust may be low. Beyond understanding this history, it is critical to own it. Without taking responsibility you will not understand the context into which you are engaging, nor have a foundation for trust and good will with the community.

### Thoughtfully set the table.

It is not sufficient to merely convene a meeting or an advisory group. Careful attention needs to be given to things like who is invited and who is left out, how the engagement facilitates voice or silence, what agreements and norms guide participation, how the process cultivates thoughtful discovery and deliberation before decisions are made, and what clarity is provided regarding roles, responsibilities, resources, and authority.

### Determine community priorities with equitable community engagement

The remaining lessons learned address the project's assessment framework for responsive economic development, detailing Prosper Portland's community engagement in order to determine community priorities, design policy and program responses, and prepare to evaluate effectiveness.

### Be clear where you are on the participation spectrum.

The International Association of Public Participation (IAP2) identifies a spectrum of participation (engagement) that includes inform, consult, involve, collaborate, and empower.<sup>29</sup> The gradations along the spectrum reflect different amounts of decision-making power held by the public and the appropriate "level" depends on context. Historically, Prosper Portland's engagements efforts fell squarely in the range of inform and consult. More recently, as the agency has aimed to center equity and inclusion, its engagement efforts have expanded to include more involvement and collaboration. Making such a shift requires sustained commitment, skillful facilitation, and a willingness to learn and grow. Each of the levels of engagement are appropriate at different times -- it is of paramount importance to be clear about where you are on the participation spectrum for any given engagement.

### Set priorities based on quality information.

Well-informed decisions require quality information, and quality information includes both quantitative and qualitative data. Of particular importance is the recognition of different ideas of what counts as valid knowledge and important information. In this case, community partners took it upon themselves to generate information that shed light on disparities which contributed to stronger commitments to addressing these issues.<sup>30</sup> At

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<sup>29</sup> International Association for Public Participation, 2018.

<sup>30</sup> Examples include the Unsettling Profiles Research Series created by the Coalition of Communities of Color in partnership with Portland State University, research documenting the massive displacement of the African

the programmatic level, an excellent example in this case comes from the IBRN program. Recognizing that output measures such as “number of businesses served” were not helpful for understanding whether and how businesses are succeeding, the staff and community partners worked together to identify quantitative and qualitative sources of information that are used to identify more responsive and productive programming.

**Be willing to listen and act, even if it’s not on your schedule.**

Engagement is often thought of as a process designed to hear ideas about a specific neighborhood, project, or program. In this case, initiatives often surfaced outside of defined “engagement processes.” A number of examples were provided where the community identified and forwarded priorities on their own. Often these ideas were initially met with ambivalence or resistance, later to become promoted as agency success stories. Engaging community to determine priorities requires an open door and responsiveness to consider and support priorities brought forward from the community.

**Establish clear expectations and sideboards.**

Asking the community what they want when there is little likelihood that you can deliver is a recipe for frustration and broken trust. Whether seeking input on the vision for a specific project or convening an advisory council, it is essential to establish clear expectations and parameters. This includes items such as roles, responsibilities, authority, funding, and feasibility (e.g., legal issues, site constraints). Backlash and bottlenecks are likely without this clarity.

**Resource community participation.**

Engagement takes time. Asking under-resourced organizations and individuals to contribute their time, ideas, and emotional labor without compensation is extractive and exploitive. For organization staff participating on staff time, this can be written into their budget. For individuals serving in an appointed capacity, while there may be limits on compensation by a public agency, it would be helpful to find other ways to fund engagement. Beyond the minimums of paying for food, transportation, translation, and childcare, agencies can look to foundation partners or others to sponsor participation in engagement activities.

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American community in the wake of development investment, and the Portland Metro Region Construction Workforce Market Study study conducted by MAWE.

### Follow through on commitments.

Inclusive and equitable place-based economic development is a long game. Engagement needs to recognize that. Name it and sustain commitment to it. If the physician's motto is "first do no harm" perhaps our profession could add to that "only engage if you'll follow through." Allocate sufficient time and resources for the desired change, anchor efforts in a systems perspective, cultivate authentic relationships with diverse community members, and view the community as your client and partner with whom co-creation is essential to achieve meaningful impact.

### Design holistic solutions with equitable community engagement for equitable economic development investments in people, business, place, governance/policy

#### Design, facilitate, and implement for systems change.

Correcting one harm only to create another is not a win. It's essential to take a systems view when designing programs and policies to respond to identified priorities. In this case, one of the most pernicious examples has been the investment in improvement to a neighborhood that leads to displacement of the very residents the investments were intended to benefit. One positive example of a systems approach has been the cultivation of productive networks among business resource providers (IBRN). Prior to the creation of the IBRN, business technical assistance providers mostly saw each other as competitors and did not have a strong understanding of or commitment to the entrepreneur's journey across the ecosystem. Prosper's convening the group as a community of practice that shares resources and co-manages has dramatically shifted that dynamic and is facilitating more meaningful programming and impact. Another positive example can be found in the agency's COVID-19 response, as they swiftly and effectively convened diverse city and community partners to engage in defining and implementing equity-centered responses.

#### Center community.

Community-led development requires community leadership and presence in the community. Both the IBRN and NPN rely on culturally specific organizations that are located in the community to inform and deliver programming. The relationships and trust are key to program effectiveness.

### Build capacity and be a true partner.

Community based organizations and businesses may not always meet traditional measures of strength or investability given their experience of historical disinvestment and exclusion. Focusing on assets and building capacity allows individuals and organizations to effectively participate in the design and implementation of programs that meet their needs. This is facilitated when unique perspectives and strengths are valued and staff serve as a true partner and resource. Examples of activities to help grow capacity include board development for the NPIs, training for members of the IBRN, and mentorship programs for contractors wanting to grow their business.

### Resource appropriately and commit for the long haul.

When designing for inclusive and equitable place-based development, it is essential that resources and time-horizons are sufficient to the task. As the sayings go, actions speak louder than words and budgets are moral documents. Expecting the community to remedy decades of disinvestment on a shoestring budget in a short time horizon perpetuates harm and will not yield desired results.

### Evaluate with priorities from equitable community engagement in mind.

#### Identify and use meaningful metrics.

A productive example of community engagement in evaluation can be found in the IBRN initiative. Participants in the IBRN collaborated with Prosper Portland staff to create metrics that could provide meaningful insight into program results. Combining quantitative and qualitative information, the new metrics help staff and partners to better understand and respond to client needs and better document client outcomes and experiences. This information is co-created by and shared with the network members and directly informs program changes. The process is dynamic and iterative; for example, Prosper is welcoming the COEP grant recipients into the IBRN and is meeting with those grantees to consider whether the program metrics need to be adjusted to meet the context of construction industry clients. Another positive example can be found in the construction data dashboard displayed on Prosper's website. The dashboard responds to community demands for disaggregated and timely information regarding workforce and contractor diversity on agency funded projects. Data is collected and displayed across the life of the project so that gaps in performance can be addressed in real time. Demands for disaggregated data are showing up in other programs as well, including performance with respect to businesses served and, most recently, COVID-19 relief.

## Be transparent and accountable.

Economic development agencies are challenged to identify performance measures that speak to community priorities while providing useful feedback on items within their sphere of influence. At the macro level, Prosper’s 2015-2020 strategy identified a number of “measures of success” that fall outside their control<sup>31</sup> and did not consistently report on these measures. These omissions appear at the project level as well, with a lack of visible information for a number of programs and initiatives. Lack of transparency and reliance on “slick powerpoints” to tell a good story undermines trust.

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<sup>31</sup> Examples include complete neighborhoods, resident satisfaction, mixed-income communities, carbon emissions, profitable local businesses (Portland Development Commission, n.d.c).

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## APPENDIX A: PORTLAND INTERVIEWS

The interviewees for this research represent a variety of perspectives relevant to the question of Prosper Portland's engagement with community to identify, implement, and assess priorities regarding inclusive and equitable place-based economic development. Our original research design was created prior to the remarkably devastating events of 2020 and called for a larger number of interviewees. We reduced the number of interviewees in deference to the crises being faced by the agency and community. We would like to extend our sincere appreciation to the following individuals for agreeing to participate in our interview process and for their service to the community. This document does not connote an endorsement or agreement by these individuals or their affiliations.

- *Oscar Arana*, Director Community Development, NAYA (Native American Youth and Family Center). Portfolio includes Cully Blvd Alliance Neighborhood Prosperity Initiative and Our 42nd Avenue Neighborhood Prosperity Initiative.
- *Shea Flaherty Betin*, Entrepreneurship and Community Economic Development Manager, Prosper Portland. Previously served as Portland Mercado Entrepreneurship Director at Hacienda CDC.
- *Carl Talton*, Former PDC Commissioner, Ex-Officio Chair United Fund Advisors, participation in community initiatives including Albina Vision and Soul District/BICEP.
- *Seile Tekle*, Director, Historic Parkrose Neighborhood Prosperity Initiative.
- *Ranfis Villatoro*, Council for Economic and Racial Equity.

### **Supplementary information provided by the following Prosper Portland staff:**

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## CASE STUDY BACKGROUND

This case study was prepared as part of the Smart Incentives project, *Reflecting Community Priorities in Economic Development Practice*. The interviews for this case study were conducted between July and September 2020.

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