

# Equity in Practice

Strengthening Transit through Community Partnerships

in collaboration with **CNT** 



## TransitCenter

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TransitCenter is a foundation that works to secure a more just and sustainable future with abundant public transportation options. We recognize that our current transportation system is contributing to climate change, that transit systems poorly serve many of their riders, and that access to opportunity in the U.S. is deeply inequitable because of unjust, historical barriers based on race, gender, culture, and identity.

We believe that targeted research and effective grassroots advocacy can persuade leaders to make better choices that center both climate and justice outcomes in transportation. We make grants, conduct research, and coordinate a national network of local advocates to build a successful movement pushing for bold shifts in transportation funding and strategy.

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TransitCenter

# Equity in Practice

Strengthening Transit through Community Partnerships

in collaboration with **CNT**



The Center for Neighborhood Technology (CNT) is a nationally recognized 501(c)(3) nonprofit organization. CNT’s mission is to deliver innovative analysis and solutions that support community-based organizations and local governments to create neighborhoods that are equitable, sustainable, and resilient. CNT works where urban form—the built environment and infrastructure of our cities—intersects with disparities by race and income.

CNT works across sectors, on topics including climate resilience, environmental justice, healthy housing, transportation equity, community-based planning, and nature-based solutions. CNT combines rigorous research with effective action, using both public policy and market forces to achieve sustainability and equity goals. CNT provides:

- Analysis: rigorous, interdisciplinary analysis of urban and regional problems, both quantitative and qualitative.
- Engagement and empowerment: collaboration with local partners and government leaders, empowering them to improve communities both independently and alongside public institutions.
- Innovation: data-informed policy, financial, and technological solutions, leveraging cutting-edge tools and insights to drive impactful change
- Community Collaboration: partnership to recognize gaps in service and devise innovative strategies to address challenges we discover jointly.

CNT’s programs leverage its analytical strengths, neighborhood connections, innovative policy ideas, and entrepreneurial instincts to produce meaningful results.

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**Equitable engagement empowers community members to shape decisions that affect them. It is achieved with breadth and depth, offering a variety of ways for people with different constraints and interests to be involved, including opportunities for people to significantly or directly influence decisions.**

**LA Metro has been refining a promising engagement method: partnering with community-based organizations on agency projects. CBOs work on behalf of people with a shared identity by providing a service, advocating on an issue, and more.**

## **Introduction**

Transit agencies should continually interact with members of their community —namely, riders and residents of the neighborhoods they serve—to ensure their services meet the community’s needs for safety, reliability, affordability, and accessibility.

This exchange, broadly known as “community engagement,” is an essential component of providing good transit service. Equitable engagement empowers community members to shape decisions that affect them. It is achieved with breadth and depth, offering a variety of ways for people with different constraints and interests to be involved, including opportunities for people to significantly or directly influence decisions.

Community engagement can take many forms, from agency staff hearing public comments on a finished project to working with constituents to design a plan or policy. Deeper methods of engagement require greater monetary, time, or staffing investments. Hence, even well-intentioned agencies may only offer passive methods of participation.

Since the mid-2010s, Los Angeles County Metropolitan Transportation Authority, also known as LA Metro, has been refining a promising engagement method: partnering with community-based organizations (CBOs) on agency projects. Community-based organizations work on behalf of neighborhoods, demographic or socioeconomic groups, religious communities, or others with a shared identity by providing a service, advocating on an issue, and more. Often, CBO staff are themselves members of their focus community.

Transit agencies often work with third parties to gather data, provide insights, engage with community members, and more. LA Metro’s new method prompts its project teams to consider CBOs for this work. As a result, this multi-purpose approach braids the perspective of community members into ongoing, essential aspects of LA Metro’s operations, like service planning and policy development.

CBO staff have a slate of professional skills and organizational resources. They also possess a wealth of knowledge about and trust with their community members, earned by regularly and directly interacting with them. These attributes equip CBOs to tackle many of LA Metro’s scopes of work — like collecting and synthesizing data about rider behavior, investigating conditions around a transit project, connecting people to LA Metro’s services, or identifying systemic barriers that prevent access — with a lens on community members’ experiences and needs.



## LA Metro's case is worth studying because it developed a dedicated plan to help CBO and agency staff navigate the ups and downs of collaboration.

The agency-CBO partnering approach has its challenges. Government agencies and community-based organizations operate very differently, from who holds power to decision-making processes to how much paperwork is required to formalize an agreement. If unaddressed, cultural differences between the organizations can lead to logistical snafus, personnel conflict, or loss of trust that doom a collaboration.

LA Metro's case is worth studying because it developed a dedicated plan to help CBO and agency staff navigate the ups and downs of collaboration. The [Community-Based Organization Partnering Strategy](#) also uplifts CBO-agency partnerships as a key tactic for advancing LA Metro's equity goals. It follows the LA Metro [Equity Platform](#), a strategy that lays out how to integrate equity into all agency functions.

TransitCenter and Center for Neighborhood Technology (CNT) worked with LA Metro and six LA-based community organizations to implement two recommendations from the CBO Partnering Strategy. In this report, we reflect on what other agency practitioners can learn about community partnerships from LA Metro.



## Key Takeaways

- LA Metro has existing infrastructure on equity and community-focused work that prepared it to adopt new tactics. The Equity Platform defines the overarching purpose for transforming the agency's approach to community partnerships, and the CBO Partnering Strategy identifies specific process steps to accomplish this goal. The Office of Equity and Race is the team responsible for operationalizing these strategies.
- This infrastructure proves LA Metro's commitment to the work, which had the practical effect of motivating CBO and agency stakeholders to engage in the implementation process.
- Our project team developed two resources, a CBO database and a charter process. We designed these with multiple stages of input from their key users, CBO and LA Metro staff. In addition to ensuring users' needs were met, the extensive user-driven design phase built buy-in from key users.
- Generous time and personnel resources were essential to our approach. Our core team included five staff members from CNT, TransitCenter, and LA Metro. The team met every two weeks for more than 18 months to discuss the research plan, process our findings, and coordinate next steps.
- We hired six community-based organizations to contribute to the research. Compensation secured their staff time and signaled that their contributions were valued.
- CNT and TransitCenter's roles as neutral, third-party researchers gave LA Metro and CBO users the space to be honest about their past experiences and future goals for community partnerships.
- Our research process uncovered additional policies and tactics that LA Metro should adopt to strengthen CBO-agency partnerships.

**Our team developed two recommendations from the strategy: a database that connects CBO and LA Metro staff to information about each other and about partnership opportunities, and a charter process to guide LA Metro-CBO partnerships.**

## Background

Transit agencies serious about building equitable systems should shift who makes decisions about the service, and how. That is a central conclusion from CNT and TransitCenter’s [2021 research on equity practices in the transit industry](#). We recommended establishing an internal strategy that identifies equity goals, such as restructuring decision-making, and means of operationalizing them. We suggested that transit agencies contract with community-based organizations (CBOs) to improve the quality of their research and engagement, inputs upon which decisions are made. Finally, we determined that a team to coordinate equity issues agency-wide was essential to success.

LA Metro provided a model for these recommendations. The agency’s 2018 [Equity Platform](#) elevated community engagement as a key tactic to make its decision-making processes more equitable and, by extension, the service it provides.

As a follow-up, a cross-departmental group of LA Metro staff wrote the [CBO Partnering Strategy](#), which was adopted in 2021. The strategy’s goals are to increase the number and to improve the quality of professional partnerships between LA Metro and CBOs. It aims to bridge organizational differences between LA Metro and its potential partners and establish a protocol to ensure that partnership opportunities are offered fairly and equitably. The strategy recommends processes and resources to support LA Metro and CBO staff in collaborating with each other.

Meanwhile, in 2020, LA Metro’s [Office of Equity and Race \(OER\)](#) formed and began implementing the [Equity Platform](#) and its extensions across the agency. The team focuses on creating equitable outcomes for LA County residents, in part by increasing LA Metro staff’s awareness of equity issues. Currently, the Office of Equity and Race has seven full-time members, including two people who manage the CBO Partnering Strategy.

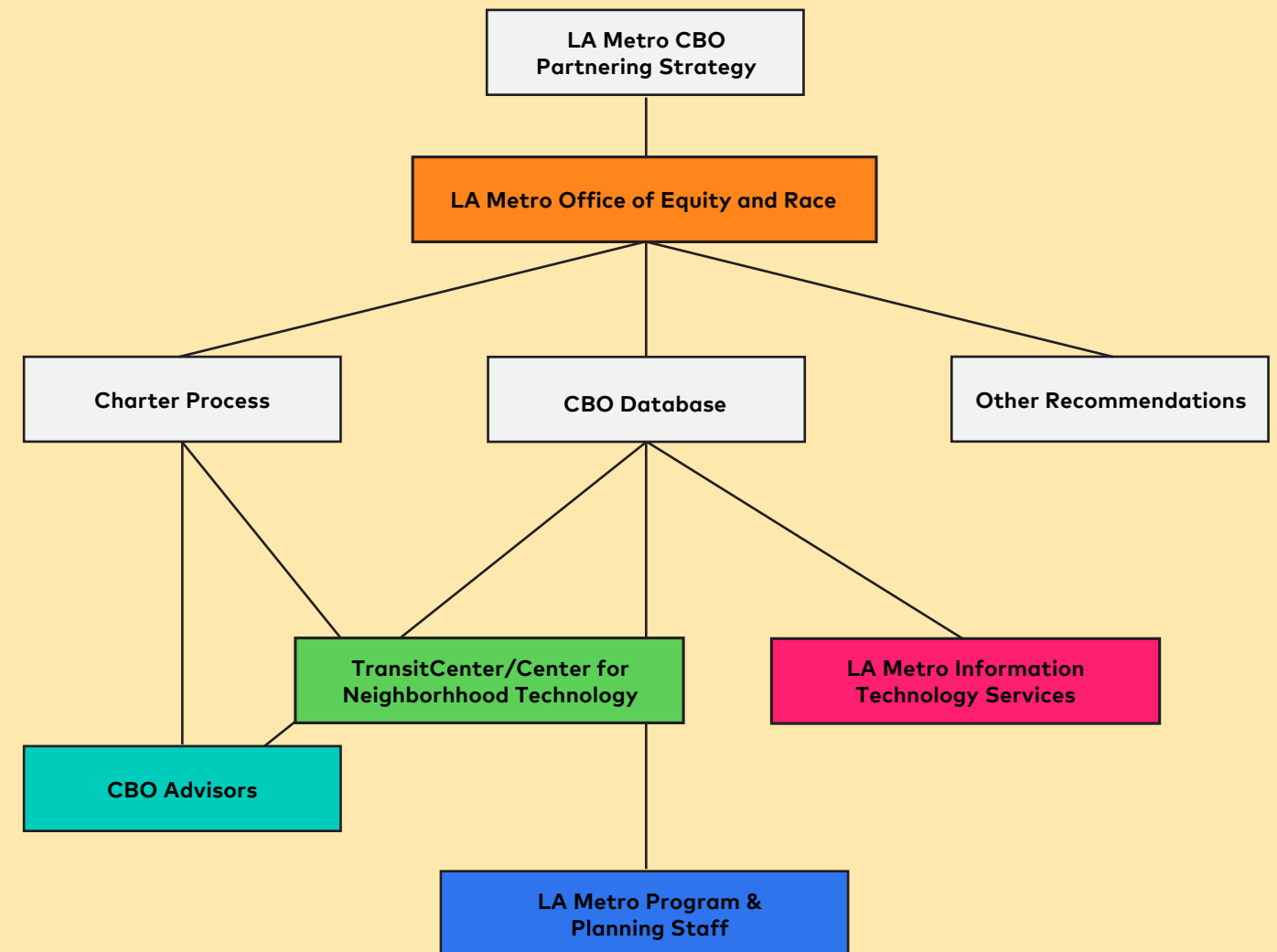
CNT and TransitCenter offered our research expertise and team capacity to the Office of Equity and Race, to aid their implementation of the CBO Partnering Strategy.

Our team developed two recommendations from the strategy: a database that connects CBO and LA Metro staff to information about each other and about partnership opportunities, and a charter process to guide LA Metro-CBO partnerships. We hired six LA-based CBOs to contribute to the design of these deliverables. Those CBOs were

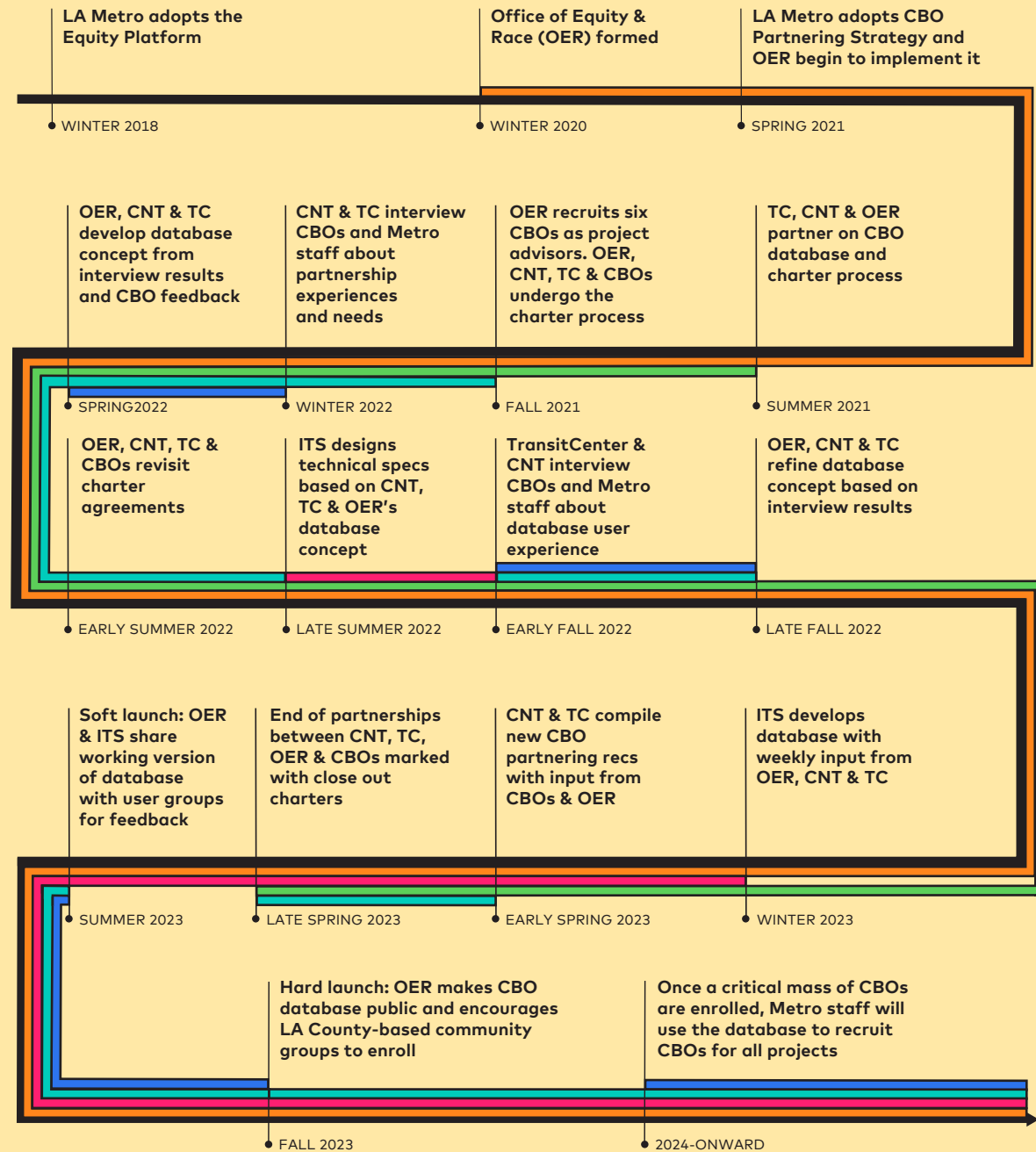
the Baha’i Center for Los Angeles, Climate Resolve, Long Beach Gray Panthers, Los Angeles Walks, Strategic Actions for a Just Economy, and Willowbrook Inclusion Network. LA Metro program staff gave input on the database concept and design, and LA Metro’s Information Technology Services team built the database.

This report describes how we developed those two recommendations. In doing so, it demonstrates the process and form that community-driven agency programs can take and illuminates lessons about CBO-agency relationships.

### Who’s Who: Implementing LA Metro’s CBO Partnering Strategy



## Implementing LA Metro's CBO Project Timeline



- █ LA Metro Office of Equity and Race
- █ TransitCenter/Center for Neighborhood Technology
- █ LA Metro Information Technology Services
- █ CBO Advisors
- █ LA Metro Program and Planning Staff

The database, with corresponding usage protocols, is meant to guide LA Metro teams to fairly, equitably, and efficiently select CBOs for partnership opportunities.

## Project design and process

### Project goals

Our team aimed to implement two recommendations from the CBO Partnering Strategy:

#### The database

A key recommendation of the CBO Partnering Strategy is to develop a CBO database. The database, with corresponding usage protocols, is meant to guide LA Metro teams to fairly, equitably, and efficiently select CBOs for partnership opportunities. It does this by centralizing and democratizing information about potential CBO partners and LA Metro opportunities.

The database is an improvement on the avenues by which staff can currently identify CBO partners. **LA Metro staff ask for references from teammates, or they refer to an email list managed by the Community Relations team. These avenues paint an incomplete picture of the network of CBOs equipped for partnership, shaped by prior LA Metro staff experience. As a result, agency teams tend to collaborate with the same organizations and inadvertently overlook well-suited organizations; CBOs have little agency to initiate partnerships if they aren't approached by LA Metro staff first.**

#### The charter process

The CBO Partnering Strategy recommends initiating a charter process for each CBO-LA Metro collaboration. The process includes a series of facilitated conversations resulting in a written document that identifies where partner organizations overlap or differ in their missions, project goals, and ways of working.

These documents, also called charter agreements, share DNA with Memorandums of Understanding (MOUs), except that they are meant to be collective, non-binding, and living. Reflecting the group's consensus, charter agreements define a shared approach for collaboration and conflict resolution — helping partner organizations to start off projects on the right footing. And because charter agreements are not legally binding, they open up a channel for challenging, subversive, or experimental project goals.

CNT, TransitCenter, the Office of Equity and Race, and each CBO advisor underwent a charter process to guide our database collaboration. Secondly, we aimed to tweak the recommended process, based on the experience of applying it six times with each CBO advisor.

**We interviewed people with varied capacities and experiences with partnerships, which helped us to develop a robust resource that would work well for a broad swath of LA Metro and community users.**

### Project team

The Office of Equity and Race managed the development and roll-out of the CBO database and the charter process.

TransitCenter and CNT worked on behalf of OER, adding capacity and providing a third-party perspective on the development of the database and charter process. Our primary objectives were to recommend a user-vetted prototype of the CBO database and to test out and improve the charter process.

The CBO advisors were paid to help shape the database development and application of the charter process. OER sent the project scope to LA Metro’s CBO email list, then selected the advisors from a group who expressed interest in the project. Advisors were selected considering factors like size, geography served, and organization type.

### Engaging users

TransitCenter and CNT employed a user-focused research approach to understand the needs and preferences of the intended users of the database and the charter process: LA Metro and CBO staff.

Over two phases, TransitCenter and CNT staff interviewed a dozen LA Metro teams from the planning, operations, and special project departments and the six CBO advisors to identify their needs and suggestions for a CBO database. We interviewed people with varied capacities and experiences with partnerships, which helped us to develop a robust resource that would work well for a broad swath of LA Metro and community users.

#### LA Metro’s definition of CBOs is broader than most definitions of CBOs

A community-based organization (CBO) is an organization\* with a mission to improve the environmental, economic, social, cultural, and/or quality of life conditions of a common community of interest.

\*The term “organization” should be broadly interpreted and can encompass groups with formal legal status and unregistered groups, such as block clubs, or other groups that may not have a legal designation yet are still organized to work on collective efforts to benefit their community.



Simultaneously, we undertook the charter process with CBO advisors and OER. At different points in the project, we reflected as a group on how well the charter process worked.

We also spoke to five LA-based foundations and governmental agencies about how they manage their CBO relationships.

## Deliverables

Below, we describe our user-focused research process and deliverables. As case studies, they illustrate the potential process and outcomes of an agency-community strategy.

These deliverables are not meant to be prescriptive or comprehensive. LA Metro identified the need for these and other resources after extensive study. Other agencies may discover that they need these *and/or other* interventions to transform their community approach.





**The interviews brought to light the necessity for the database to facilitate bi-directional communication and capture the full spectrum of skills and expertise that CBOs can offer.**

Here is how the two primary user groups are expected to use the database:

## Database

### Approach

The first round of interviews about the database, conducted between February and May 2022, established how LA Metro and CBO staff *have* and *would like to* work together, introduced the concept, and identified potential features and data needs for the database. The second round of interviews, in November 2022, solicited feedback on the proposed list of data fields and elements of the data collection process. Second-round interviewees formed their opinions after testing out a database prototype.

Throughout the research phase, we conferred regularly with OER about the results of our research and worked together to interpret the findings. We also shared major research milestones with the database development team, LA Metro’s Information Technology Systems (ITS), who in turn gave insight into the required technical components and the feasibility of proposed ideas. We sought additional feedback from members of the Community Relations team, who are anticipated to be power users of the database.

### Deliverable

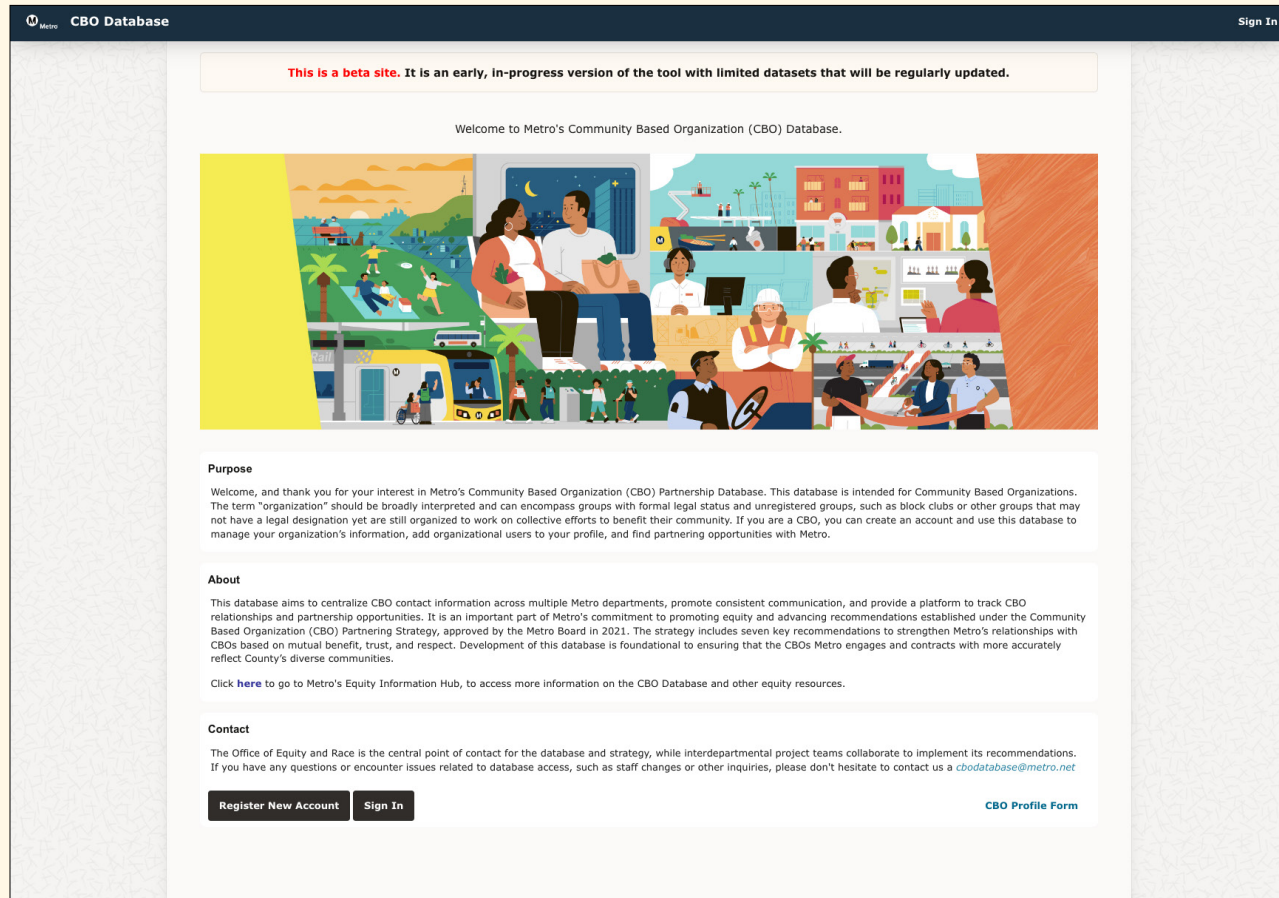
Based on our research, CNT and TransitCenter created a detailed database concept and rudimentary prototype. Our concept established the primary functions of the database. CBOs create organizational profiles and share relevant information about their work with LA Metro staff. Staff, in turn, are expected to use the database to identify potential CBO partners based on how their constituencies and expertise align with project needs. Feedback during our interviews shifted the concept from an internal resource for LA Metro staff only into a database with features for registered CBOs as well.

**CBO staff:** CBO staff register their organization in the database. They make an organizational profile by inputting details such as their contact information, services offered, geographic scope, constituents served, and their past and ongoing partnerships with LA Metro. Each CBO profile designates primary users with update privileges and secondary users with review privileges. CBO users can search and view limited information about other CBOs. This feature encourages relationship-building and collaboration.

**LA Metro staff:** LA Metro staff log into the database using their agency credentials. Staff can access the database and search CBOs by parameters (such as services offered, geographic scope, etc). The database generates a list of CBOs that match the search parameters. Staff can click through to organizational profiles to find more information, or download the list. Staff can also message CBOs directly via the database. This feature helps to ensure consistent communication across the agency. All Metro staff can access the database, but only a restricted number of staff members who regularly collaborate with CBOs have the capability to contribute to the profiles of CBOs. OER staff members serve as administrators of the database and also have access to its backend.

The interviews brought to light the necessity for the database to facilitate bi-directional communication and capture the full spectrum of skills and expertise that CBOs can offer. As a result, we added certain data fields and communication features to the database concept, including an opportunity center where notifications of partnership opportunities are accessible to all registered CBOs and a platform for sending messages between LA Metro teams and CBOs. Interviewees also highlighted the need for usage protocols, to teach users how and why to use the database for fair, equitable selections of CBO partners.

LA Metro Information Technology Services (ITS) led the development of the database concept into a working version. After evaluating in-house and third-party software options for suitability and cost, ITS decided to create the database in-house using Oracle. This decision was driven by the unique requirements of the database and the need



for accessibility by all LA Metro staff. OER, CNT, and TransitCenter staff advised ITS on the development of the database to ensure that users' needs were considered.

LA Metro publicly released the CBO database in [October 2023](#). By early November, the database boasted 132 active registered CBOs. Once a critical mass of CBOs has registered, OER will transition LA Metro teams to default to using the database when recruiting CBO partners. Meanwhile, OER is training LA Metro teams on how to use the tool. ITS is continuing to refine the database; future enhancements include aligning the database with accessibility standards and adding an “opportunity center” where external peer agencies can post partnership opportunities.

**We recommended developing other charter templates with more structured language; using collaborative software to write and edit; and having a neutral facilitator.**

## Charter process

### Approach

Each charter process included OER, CNT, and TransitCenter project team members, as well as staff from each CBO.

OER staff kicked off each charter process by explaining its purpose, outlining its steps, and providing [template](#) language as a starting point to develop our own agreements. Using a collaborative word processor, we all reviewed and suggested changes to the template. Then came a few meetings to edit and finalize the charter language as a group. To center the community perspective, CBO staff led with their suggestions, OER listened and responded, and CNT and TransitCenter facilitated the conversation. Once all parties approved the language, the charter agreement was officially enacted.

The first phase required the most attention but was an investment: we developed strong charters that made navigating the project work easier.

At the project's midpoint, we revisited each charter agreement to confirm that parties were abiding by its direction and that the language was still appropriately matched to the partnership. At the end of the project, we reflected on the value of the charter agreements, as well as the challenges and victories of our collaborative project work.

### Deliverable

The CBO advisors, OER, and our own CNT and TransitCenter staff had positive feedback about the charter process. We recommended that OER deploy the charter process as designed in the CBO strategy, with some small tweaks.

For example, we recommended developing other charter templates with more structured language, to help prompt participants without experience in CBO-agency partnerships; using collaborative software to write and edit charter documents more seamlessly; and engaging someone from outside the project teams as a neutral facilitator.

Since, several more LA Metro projects have deployed the charter process, but it isn't an agency-wide requirement yet. The Office of Equity and Race is developing resources, like more template documents and facilitator guides, to better prepare teams for successful charter processes.

**The database and charter process are not standalone tools, but integral components of a strategy that guaranteed an overarching vision and agency resources for implementation.**

## Conclusion

LA Metro made progress on its goal of enhancing its community engagement by developing the database and charter process. (Work remains to realize the full impact of the tools: LA Metro has to roll out the database and charter process for all agency project teams to use and periodically update the tools to ensure they meet stakeholders' evolving needs.)

CNT and TransitCenter identified key takeaways over the course of the project. Other agencies can consider these if developing their own community strategies.

### Organizational takeaways:

LA Metro has a strong infrastructure on equity and community-focused work that prepared it to implement elements of its CBO strategy.

- 1. Agency-wide Strategy:** The database and charter process are not standalone tools, but integral components of LA Metro's comprehensive CBO Partnering Strategy. The strategy guaranteed an overarching vision and agency resources to guide the implementation of the tools.
- 2. Centralized Ownership:** The Office of Equity and Race leads the implementation of the CBO Partnering Strategy and its components. OER's centralized ownership ensured that the database and charter process were developed efficiently and consistently.
- 3. OER's Strategic Role:** OER holds cross-departmental jurisdiction at LA Metro, which allows them to coordinate the elements of the CBO Partnering Strategy implementation that impact the entire agency.
- 4. Experience with CBOs:** OER team members have practical experience working with CBOs and are familiar with the dynamics of agency-CBO partnerships. OER team members are adept at building trust with CBO staff and can train agency colleagues to do the same.
- 5. Early Buy-In from Agency Teams:** LA Metro ITS, Community Relations, and other teams contributed to the development and rollout of the database at different stages. OER brought the concept to partner teams early and often, allowing them to shape their role in the database's development. This approach



**Users were bought into using the product because they contributed to its design.**

secured their commitment to the project and strengthened the end product.

- 6. Leadership Involvement:** OER leads important equity efforts across LA Metro. LA Metro's General Manager approved of the database development project, and OER kept her informed of the project's progress. Leadership's commitment to the project motivated CBO and agency staff to participate in the research and helped propel the project past administrative barriers.

### Process takeaways:

Our project process made time and resources available for trust-building, extensive user input, and iterative improvements to our deliverables.

- 7. Establishing Trust:** The charter agreements signed by LA Metro, CNT, TransitCenter, and CBO staff signified each party's commitment to the project and achieving a common goal. This built a foundation of trust between each party from the project's onset.
- 8. Level Setting:** Charter agreements clarified how parties would work together and for what purpose, guarding against mismatched expectations that could have led to conflict.
- 9. User-Driven Design:** We interviewed multiple CBO and agency staff members to understand what they needed from a database. The needs of the would-be users shaped the concept, prototype, and working version of the database. Users were bought into — even excited about — using the product.
- 10. Iterative Database Development:** We went between interviewing users about their needs, improving the database design, and then asking for additional feedback several times. The iterative process allowed us to continuously, confidently shape the database into a tool that met its users' needs.
- 11. Time and Staff-Intensive Engagement:** It took more than 18 months to develop and launch the database, with weekly contributions from five team members. The time and staff resources were necessary to thoroughly research user needs and to develop and refine different versions of the database.
- 12. Neutral Third Party:** CNT and TransitCenter offered capacity to LA Metro, allowing the project to develop on a faster timeline. Our neutrality encouraged CBO and agency staff to be honest about their hopes and concerns related to agency-CBO partnerships. In the absence of an external party, an

**CBOs should be compensated for their professional contributions to agency scopes of work, consistent with how other third parties would be compensated.**

internal team with cross-departmental authority and experience leading non-traditional or subversive efforts could generate similar results.

- 13.** Phased development and continuous improvement: External stakeholders, including consultants and governmental agencies, have expressed interest in using the database. LA Metro must decide how to approach data sharing and safeguarding private, sensitive information, then initiate updates to the database to effectively address these concerns.

**Partnership takeaways:**

Our experience identified additional policies and tactics to strengthen CBO-agency partnerships.

- 14.** Relationship-Building Meetings: The charter process required dedicated time for relationship building between LA Metro, CNT, TransitCenter, and CBO staff. This strengthened our collaboration, because individuals were more comfortable giving more critical feedback or surfacing feedback on adjacent issues.
- 15.** Direct Interactions: Reflecting upon past agency partnerships, CBO staff wanted to interact directly with LA Metro staff more regularly. We recommended that LA Metro create avenues for direct connection outside of project work, including assigning an LA Metro point of contact for each CBO, hosting “meet and greets” between CBOs and Metro staff, and offering “office hours” open to all CBOs.
- 16.** Flexible Participation Models: CBO staff wanted more opportunities to define their roles and responsibilities alongside LA Metro partners, rather than responding to a pre-defined scope of work. This would give CBOs more influence over the outcomes of the project and would ensure that the project approach optimizes their skills and assets. We recommended that LA Metro explore new models for selecting CBOs, such as a “bench,” where a set of CBOs are pre-approved to contract with LA Metro on any variety of projects.
- 17.** CBO Compensation: CBOs should be compensated for their professional contributions to agency scopes of work, consistent with how other third parties would be compensated. An intermediary organization (like TransitCenter in this project) can deliver compensation to CBOs if there are administrative barriers in contracting directly with CBOs.

**Simplifying procurement-related processes could open new avenues for CBO-agency collaborations.**

- 18.** Simplifying Procurement and Partnerships: Agencies formally “procure” professional services from third-party consultants for many scopes of work for which CBOs may also be qualified. But agency procurement processes can be prohibitively cumbersome for CBOs to navigate. Simplifying procurement-related processes could open new avenues for CBO-agency collaborations, enhancing the agency’s work through deeper community influence.



# Appendix

## Other LA Metro-Community resources

The Office of Equity and Race and partner teams at LA Metro continue to develop resources and programs to further LA Metro staff's capacity to work with CBOs on project work.

Aside from the CBO database and charter process, they include a series of trainings for staff (think: "Working with CBOs 101"), equity assessment tools, a tracking form designed to document LA Metro teams' process of selecting CBOs, a checklist of procedures and documents required to initiate CBO partnerships, a wiki page as a go-to reference for CBO engagement, and the Equity Information Hub—a centralized site where many of the resources listed above are located.

Below are links to LA Metro's publicly available resources for CBO-agency partnerships.

### LA Metro-CBO Resources

- [LA Metro Equity Platform](#)
- [LA Metro Community-Based Organization Partnering Strategy](#)
- [CBO database](#)
- [CBO Charter process draft template](#)
- [Project charter facilitators guide \(pages 38-39\)](#)
- [Equity Assessment Tools](#)
- [Equity Information Hub](#)
- [CBO Partnership Considerations Checklist](#)



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