External Innovation Advisory Workgroup – Regional Culture Shift
November 10, 2015 from 10:00 – 11:30 AM
Metro, Council Chambers

Driving question: *How can we inspire a regional public service culture that listens deeply to community voices? How can we collectively support elected leaders and agencies across the region to build stronger relationships of trust with underrepresented communities?*

Meeting goals:

- Review and provide feedback on updated guiding principles
- Discuss how to assess an agency's readiness to successfully and meaningfully engage underrepresented communities **(didn't get to this)**
- Identify and prioritize opportunities for public agencies to collaborate around this work

Participants: Marcus Ingle, Masami Nishishiba, Gary Marschke, Greg Greenway, Michael Dahlstrom, Doug Zenn, Aaron Abrams, Cliff Higgins, Heather Coston, Luis Nava, Peggy Morell, Erin Pidot

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Meeting notes:

Introductions and overview

- Peggy started us off by providing an overview of the process leading up to this point. We've worked with several teams of people—this group, staff advisory & leadership advisory.
- Everyone stated name, title and organization

How will feedback from this group be incorporated into Metro's work going forward?

- Cliff provided an overview of how the innovation work generally, and input from this group specifically, is informing work at Metro
- One of the things already accomplished – pushed forward dialogue within and across agencies around inclusive engagement and decision-making
- We all know that there's something missing, that we're not doing it right—this has produced a lot of good thinking around that including how to get elected officials to start recognizing the value of this work
- Has given the Community Relations team an indication of what the budget ask has to be
- Helping us narrow in on the recommendations and action steps that we need to advocate for—both in our work internally and in our role as a regional convener
- Mike – how to illuminate business case to elected officials so that effort moves forward? Will you share that with the rest of us? This piece is really important
- Cliff – yes – we will share everything back out. Business case piece of it we will have to continue to make over time because elected officials change and context changes – Metro well positioned to be central nexus for this change to happen, though some local jurisdictions are ahead of the curve – Portland and Beaverton come to mind. Need to demonstrate that historically underrepresented communities are just as important to listen to as others (like freight stakeholders).
- Mike – In Beaverton, seems like benevolence is driving this work; when benevolence isn't driving factor, need to make the **business case**. This might be most important piece of this work.
- Marcus – each community is different – can talk about value add and metrics and then should try to find way to help community adapt business case based on local context and where they sit. Guidance on how to adapt business case to local setting in real time.
- Cliff – seem to be 2 cases to make – 1) equity business case, and 2) political business case of engagement. How to convince that it is worth the effort in second case because this work is focused on empowering communities that are in a lot of cases politically disadvantaged.

- Gary – critical that this continues to remain collaboration across the region – only way we'll get resources is to share resources. It will be a wasted opportunity if this dies down.
- Cliff – where are opportunities to collaborate to save communities time?
- Gary – leaving behind sustainable capacity is mark of good engagement strategy → build capacity to remain engaged
- Aaron – good public involvement makes easier the next time around (the opposite is also true)
- Mike- perspective from private side?
- Doug – a lot of people on private side have come from public sector – a lot of the same cases hold true
- Luis – Beaverton – private group got together and are doing our own stuff, but will need resources later to move these projects forward. Need a model that works for more isolated parts of the region
- Cliff – where do we invest what we can to build capacity without co-opting the political process on the ground created by the community – how to support the community in the right way.
    - Ex. Washington County Latino Community – coalescing and taking on political party; but Somali community in East Portland not as much – how can we help build their capacity

Updated guiding principles

- Aaron - a little academic to share externally – maybe add a graphic element? Bubbles that outline single words/phrases → bold key terms or headline for each of them → each one is explanation of pithier overview (ex. Acknowledge History). Once you do this, you may find you can collapse some or have them in a tiered format – for example, there are a couple around evaluation. Big categories seem to be: quality, measuring, capacity building, leadership
- Gary – audience? Seems to be for public engagement folks, rather than for public officials or community members. Like key word idea, but be cognizant of how key words translate and context around them.
- Marcus – I want to challenge the premise that this list should be Metro specific – work embodied by Oregon Innovation Award has an important Metro component, but also an important community component → one thing you could do is think of several roles and which roles each principle applies to
- Peggy – some of these principles would be fresh for Metro, but other local jurisdictions are already doing extraordinarily well
- Mike – at table we have a variety of experts and concurrence that principles are universally applicable – whether we're already doing them or aspiring to them – that alone is a business case (we as experts/professionals recognize these principles as…)
- Masami – very universal that everyone is trying to aspire to and act on – one thing unique to Metro is that multiple jurisdictions – how to instill within organization and region – requires a new approach.
- Masami –distil principles into 3 or 4 because the can make an acronym – something that sticks in people's minds and is easy for everyone at Metro to remember
- Luis – part of process of engaging community – find something that relates to community members – explain what's going on, purpose, what is your part in it – problem is time – always want to do something right away
- Greg – challenge with capacity building – business case for elected, but also for community members – is it worth their time and effort to engage?
- Luis – continuity is important
- Masami – building sustainable capacity – the youth engagement work that Metro is doing is a really important part of this. May not recognize immediate business case for youth engagement, but difficult to say no to it. Can capitalize on this – youth engagement pipeline.
- Marcus – out of the box thinking → #3 – don't build capacity, engage people in opportunities that are value-add – learn by doing – same with decision-makers
- Cliff – counter-point to this is that #3 is hinting at a budget ask – need budget in order to accomplish this
- Aaron – new experiences vs. successful (or valuable) experiences – doesn't always have to be something new
- Mike- transactional cost of every interaction
- Greg – principles as they currently read are not for public consumption – not appealing – more an internal code

- Greg – needs to be clear that this is a set of guiding principles around inclusion – different from set of best practices – maybe room to translate to action geared around inclusion – set of best practices for regional agencies – manual. If committed to these principles, this is how you do it
- Peggy – guiding principles are setting the table – values around inclusive public engagement – when go to council – won't start with actions, but values

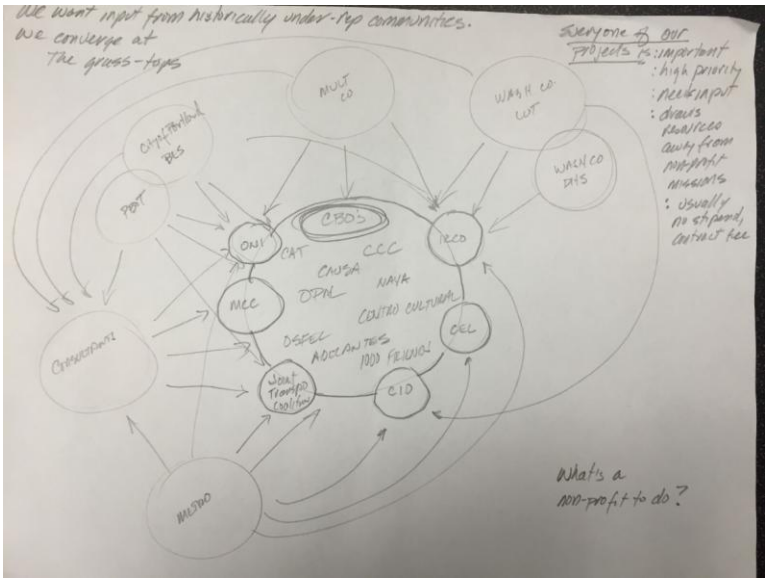
What does an agency need to have in place in order to successfully and meaningfully engage underrepresented communities in the decision-making process? (skipped this because running short on time)

How can we sustain and lift up regional collaboration? What is Metro's role?

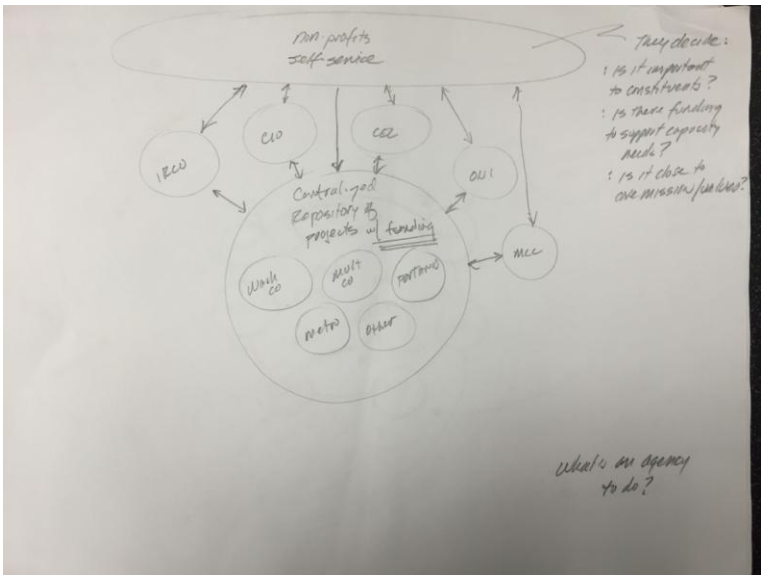
- Mike presented his proposal for a paradigm shift around public engagement across the region (see images from his presentation at the end of the notes)
- Currently – public agencies are attacking nonprofits, as representatives for constituents, from all sides – "our project is so valuable that you have to engage" because want diverse community perspective and because mandated to do so through Title VI, etc.
- Look to Metro as potential source of or portal for collaboration. Each agency defines public engagement opportunities and resources and nonprofits can select the ones that best match their mission and that provide the best resources, etc. Could be a web portal – each agency has a page with all opportunities listed and CBOs can shop around.
- Aaron – problem is that local jurisdictions compete for funding and some agencies will never have the same level of funding as others to do public engagement work
- Cliff – will this lead to better coordinator or competition?
- Gary – completion isn't a bad thing especially when it comes to leveraging resources. But how do we avoid having whole thing from acting as gatekeeper?
- Masami – model reminds me of one case of small group of people in Oak Grove who wanted to protect trees and didn't know what to do – worked with Trimet to apply to Metro for a grant – in exchange, Metro now connected to Oak Grove – similar pathway in this model. No coordination mechanism in status quo – rather than portal, connecting/info sharing role – try to create a network with metro as Hub
- Mike – spot on. Reason thought about this because Metro doing work of bringing coalitions together – making those connections somehow regional
- Aaron – resonates with me – want easier way to look at it – but fact of matter is work is messy and about relationship building. A new system can't replace relationships that each agency needs to make. Worry that if we use this system we will miss out on the relationship building piece – have to be comfortable with organic and messay nature of this work → need a combination of strong network AND also team of super energetic and committed staff who can build relationships
- Heather – this model is like PEN on steroids – from info sharing to building and collaborating on projects. How share info better? Missions and goals don't necessarily align – won't work if don't need the same thing
- Mike – mission alignment is critical piece – agree with personal relationships, but that person leaves and then what. Need a middle ground.
- Greg – really like this idea → information clearing house → fantasy that you can just go to a webpage and find information meaningful for you → value-add is allows organizations and communities to match mission and agencies to gain those participants – can't imagine it going further than that in regards to relationship piece. Great for staff within region too – find other agencies working in the same space
- Heather – similar to Nextdoor
- Gary – Vision PDC, Vision into Action model – great job of reaching out
- Gary – acronym = CACHE - Convene Aggregate Connect House Engage
- Marcus – love idea, info sharing is great, but want to put teeth in it. Resources driving engagement part of acronym – refocus to where resources are available – driven by demand

Images from Mike's presentation:

Status quo:



A new approach:



Prioritizing draft recommendations for Metro's regional role

- Aaron – already a regional network of CIOs
- Gary – want to see something about digital literacy on this list – City of Portland is doing a Digital Inclusion Strategic Plan in anticipation of Google Fiber which will only increase inequality – Mary Beth Henry at COP is the contact
- Attendees marked the three recommendations that they thought would be most helpful with a dot – see results below (each * indicates a unique dot)

Draft recommendations for Metro's regional role

Resource sharing	• Online regional public engagement resource library that includes public engagement guides, findings from community input, best practices, engagement reports, info about CBOs and communities, etc. *** ○ Enable users to review resources with stars/comments so that it's easy for others to see which are the most useful • More best practice, success and challenge, and resource sharing around inclusive engagement and decision-making * • Regional board to run public engagement plans by** • Opt In
Directory sharing	• Online directory of CBOs that you can sort by location and type of CBO. CBOs can sign up and submit request to update information—could include questions like: What does your CBO do? Who do you serve? Contact information? How does your CBO/community like to be engaged? Successful engagement strategies? What doesn't work? What do you want a public agency to know about your community before they reach out? What kind of opportunities are you interested in engaging in? * • Online directory of local jurisdictions and planning projects—every jurisdiction has a section, every section has a list of projects with funding available for public engagement, includes a mechanism for CBOs to easily respond and explain why interested or not interested. Sustained by minimal contribution by each jurisdiction * • Online directory of internship, volunteer and job postings for jurisdictions across region and regional strategy or best practices for engaging underrepresented populations in these opportunities
Network building	• Quarterly public engagement forum for jurisdictions to share info about opportunities to engage, CBOs to share best practices, everyone to share success stories/challenges, and networking–*modeled after Metro's Quarterly Trails Forum* ** • Expand the Public Engagement Network (PEN) and provide opportunities to connect virtually and in-person between bi-annual meetings • Education/training for regional leadership on inclusive public engagement and decision-making - policymaker to policymaker ** • Peer-to-peer decision maker network* • Regional network of CIOs, CPOs, ONI offices * • Create opportunities for community leaders to share stories and engage in dialogue directly with regional decision makers * • Regional version of New Portlanders program - outreach to newcomer and refugee communities by cultural liaisons, identify cultural liaisons from within communities and support with stipend** • Regional conferences/events around themes – ex. Age-Friendly Multnomah County and Portland initiative *

Standard setting	• Require contract/grant recipients to have plan for evaluation and report back * • Set standards and share resources for regional evaluation—standardized demographic questions, standardized indicators, public engagement evaluation framework *
Funding	• Seed money to support public engagement efforts at the regional level to do more extensive culturally relevant engagement with underrepresented populations—something like Nature in Neighborhoods grant program. Example of Gresham getting funding for Powell/Division – helped project go from just okay to award-winning. ******
Research	• Analysis of who goes to PEN meetings and outreach to underrepresented groups • Survey of decision makers on attitudes toward public engagement*

+ Regional version of Diversity in Civic Leadership program*

+Digital inclusion *