

Innovation Advisory Workgroup – Long-term relationships and capacity building
October 20, 1 p.m. to 2:30 p.m.
Metro, Room 401

Participants: Melissa De Lyser, Michael Dahlstrom, Luis Nava, Gary Marshke, Doug Zenn, Aaron Abrams, Jennifer Ball, Greg Greenway, Cynthia Alamillo, Heather Coston, Becca Uherbelau, Addie Shrodes, Peggy Morell, Erin Pidot

Driving Question: How can public agencies develop and maintain long-term relationships with CBOS that work with underrepresented communities and promote capacity building with these communities

Meeting goals

- Share successful examples of long-term relationships and capacity building efforts
- Discuss guiding principles for long-term relationships
- Brainstorm opportunities for and potential benefits of regional collaboration

Meeting notes

Introductions and overview

- Due to a fire alarm, we started the meeting 30 minutes late and had to cut back on time for each of the discussion items
- Peggy reminded us that we have internal staff meetings going on at the same time on the same topics; some of the information we are sharing on the one-pager of major takeaways from the session on evaluation comes from this group as well as the group of Metro staff
- Peggy noted that Cynthia wrote a report for Metro last summer to assess the agency's relationships with CBOs, which directly inspired the innovation work and our discussion today - towards the end of the meeting, she will provide an overview of the work that she's doing now to create tools that support agencies in establishing and maintaining long-term relationships

Define long-term relationships and capacity building for the purposes of our work together

**See handout with draft definitions of long-term relationship, community capacity building and agency capacity building*

- **Long-Term relationships**
 - Melissa – relationship is mutually beneficial, but definition describes the agency doing everything - in order to have a relationship, the community has to put something in as well; how do you explain to a community – we want your feedback, but we want more than that – we want a true relationship
 - Jennifer – it's a mutual investment in each other's well-being and success
 - Doug – about reciprocity
 - Aaron – but capacity gets to that
 - Heather – but capacity is still outward facing
 - Gary – add a few words about a mutually beneficial and reciprocal relationship
 - Becca – would add that the onus is more on us (the agency) - wouldn't want to say that the community needs to give as much to this as the agency; wouldn't want to give a pass to agency if the community isn't doing 'their part'; they have to be present, but the responsibility is on us
- **Community capacity building**
 - Greg - need to have something at the beginning about strengthening

- Doug – build up the community to contribute and do something
- Mike – needs to have the support of elected officials, otherwise it won't work
- Gary – rewrote first sentence: empowering communities to effectively and sustainably engage in the work of a public agency – part of capacity building is leaving that behind
- **Agency capacity building**
 - Jennifer – allocating the time doesn't mean there is a structure in place to make sure it gets done or that people know how to do it; saying you have the time is not the same as getting it done
 - Becca – be sure to call out resource allocation very intentionally
 - Greg – add sustainably to the agency capacity as well

Share successful examples of long-term relationships and capacity building

- Erin asked members to focus on the factors that led to success
- Mike asked us to start with how we define success
- Gary – success is defined in the context of a specific project; maybe tell your story and define what success looked like for you in that particular context
- Greg – **City of Portland Diversity and Civic Leadership program**; involves 5 CBOs and may expand; may be replicated in Beaverton; suggested that we look at a report of the program, specifically the section called 'lessons.' Lessons include 1) involve CBO in program design, including the scope of work; 2) fund the program for multiple years – not a one off; 3) first build relationships, then build skills, then build the relationship into the public process; 4) allow community members to determine their own needs and priorities – trust their leadership group, but know that no one leader speaks for everyone in their community – don't just engage the leaders; 5) recognize that different CBOs approach the work differently – program can have the same targets, metrics, goals, but needs to be flexible in how they get there – ex. community groups that are social justice-oriented (relationships, organize, mobilize) vs. social service (provide service and move people on); 6) finally, the idea of supporting a particular community's agendas, issues and needs. The whole point of program is to build capacity; resources – to get sustainable channel; access to leadership – designed to build relationships with decision makers; influence. Bottom line – a capacity building program ought to end with the community having more influence over decisions.
 - 3 major factors of success: resources from agency → community, access to leadership, influence
- Erin asked whether there had been an evaluation
- Greg said that there was an explicit decision not to evaluate because it was a work in progress; but there is an evaluation component.
- Gary – part of the outcome on the civic leadership program is that we need next steps, need to have other jurisdictions in place – need 2.0 and 3.0. Also, there's a lot of crossover, there are different forms of organizations and some of them by necessity, like Africa House, they do both, cross and blur those lines because they find advocacy is the way to get resources and social services that they need.
- Greg – idea of people getting jobs, not the primary outcome, but it's a natural part of the process – some of these people we engage may end up working for government, expected outcome, strengthen the agency long term
- Luis – **Washington County (Cornelius and Forest Grove)** – community group identified common goal and decided to try to make it happen within 90-days and we were successful. We ended the 90-days last week and were able to take all of the steps for us to reach our goal. Now planning

next 90-day goal. One of major concerns is that previously we talked but never did anything, so we created a project that we are focused on; we are focusing on youth and amazed that youth are very engaged; successful for us; a lot of partners; want to make things happen; getting involved with government for support and guidance is the next step

- Factors for success: common goal and having a specific project to work on - need to do something concrete
- Peggy noted the need for regional coordination and collaboration; a central place where the resources, like these examples of projects, could be in one place - what were the most important things and how did you measure success
- Mike – example that was not a success from Washington County’s point of view, but was a success from community point of view. **Urban-rural reserve process**, one of the rural areas coalesced around idea of protection of farmland and lifestyle – **Save Helvetia** – grassroots coalition for a common cause that pushed back against regional decisions; were persistent, kept asking questions about how to have influence, formed a voting block, became a nonprofit; very thoughtful, educated and informed so they developed their own process to keep asking questions about the process, led them to create very strong grassroots movement; now the leaders of the movement have continued to be very engaged in county issues; had impact on the process and decisions
 - Factors of success: community formed coalition that became nonprofit, persistent, educated, community-led process, had influence, leaders remain engaged with county
- Peggy - one of the really successful relationships that Metro has had with CBO involved disagreement, agitation, etc., that’s what successful engagement looks like – it involves pushing back against Metro and other public agencies
- Mike – it influenced the process, and the relationship continues
- Cynthia asked Mike what were some of the activities
- Mike – they were involved in land use decisions, legislative decisions, significantly changed land use pattern for the next 50 years, remained involved in other rural issues, because they believe they have a knowledge base and advocacy that other rural communities don’t
- Jennifer (via email) – success factors of some of my long-term relationships: transparency throughout the project/relationship around limitations, parameters, and prioritization that affect how we are using the feedback received. We talked a bit about how important it is to be transparent up front about the scope and limitations of the public engagement, but it's also really important to be up front around how the information is being considered and decided upon. I found this important throughout the project as part of my report-back. It was the critical factor in gaining respect, especially from skeptics.
- Jennifer - Keeping skeptics close and engaged, particularly in the process above, so they gain a good understanding of the what and why, as well as giving them a chance to gauge sincerity, authenticity and honesty.
- Jennifer - constant references to how we used the input received, through in-person communication, casual email communication, publicity and promotion pieces, and all report-back methods. This was really a huge part of our communication strategy. I quoted or referenced previous participants a lot when talking with or trying to engage other community members. I used a lot of pull-quotes in my promotion pieces.

Discuss guiding principles for long-term relationships

**see handout of draft guiding principles*

- Erin transitioned the group to look at the handout and start thinking about guiding principles that could guide all of our work; tool for leadership and staff level; what are the most important elements to keep in mind when coming up with community relations plan and embarking upon a relationship? Is this a useful tool and how can we make it more useful?
- Aaron – under empower staff, ultimately in a public agency you do what’s in the job description, so it would make sense for people’s job descriptions to be rewritten to include time to build relationships and trust; and make it part of the performance review; especially in a union environment, it allows people to have that flexibility
- Aaron – number 4 –make something about compensation its own standalone item
- Melissa – question, what do you mean by volunteer work days as part of engagement plan?
- Erin – this is about what agencies can do to learn about community; if there is a community-run project, could volunteer to learn about and support; could also mean going to a community celebration or event; be present
- Aaron – my citizen involvement committee thinks about volunteerism as part of engagement; blends volunteerism and community engagement
- Melissa - politically speaking, is that going to be problematic? If you volunteer for X and not Z, would that cause issues? You’d be working for the nonprofit, not just attending an event
- Aaron – it has been one of our most successful things – we put on volunteer events and invite them to come participate; they put on events and we attend
- Mike – we’ve actually led volunteer events where we invite organizations to convene with us, but the county convenes
- Aaron – public agency and community both put on volunteer events – ex. Rock the Block in Gresham - is on staff’s own time, part of community building
- Melissa – I was looking at the ‘work day’ description – would that be a union or political issue?
- Erin – maybe this would be a list for community agencies to choose from based on what makes sense for them
- Heather – it might be okay with Metro, allowed to do volunteer days with communities
- Cynthia – the core of this is to spend time with CBOs and their activities
- Maybe the guiding principle is – review current policies to see if allowable
- Gary – Multnomah has employee resource groups, and we have one around volunteerism, to get Mult. County groups to volunteer for things; employee resource group does project with the partner, collect volunteers
- Doug – is it always more, or is it about getting to the right level? It’s a moving target and its always different for different projects; instead of nothing to something, something to the ideal
- Aaron – some of our best successes is when we’ve gotten out of the way
- Luis – under building trust, number 2, select, schedule and attend, I would like to add, to participate. Why? Because attending an event is not building a relationship; that makes a huge difference because police went to an event and were participants rather than observers
- Gary – engaging entire community rather than just the leadership – instead of just going to the usual suspects, make a concerted effort to reach the entire community. Also want to bring up how important #14 is – to set joint expectations. In my experience the biggest disconnect is that community comes in with unrealistic expectations
- Greg and Mike – needs to be a connection between #6 and #14 to make it clear
- Jennifer – in addition, one of the things that has really worked for me is being up front and clear about priorities that I’m setting and why - limitations in budget, etc. In dealing with people who are skeptical, that is what has got me through to those people, be clear instead of making it vague. I love what you are suggesting, but this is why I can’t do that right now.

- Heather – we’ve been talking about a cultural shift that needs to happen in the agency in order for this work and the youth engagement work to be successful – planners think they need to be secretive about the way input is used because they want control over the project, so it becomes not authentic or transparent; that’s really important for us to think about
- Doug – it if you have a relationship, you can be truly honest and up front about how you use material
- Peggy – if I put on my public engagement hat, I would be overwhelmed with when and where to use a list like this, so an objective for engagement would need to come before so that you can select what resonates for your project; helps to have clear objectives around public engagement
- Mike – huge challenge for county, are you looking at engagement for a project, or are you looking at relationships long term so that you can sustain community dialogue, so not just when something is about to blow up; are you looking project or long term; sustaining over long term and project basis, and how do you sustain those? Also looking at urban, urban boundary and rural, and how do you look across?
- Jennifer (via email) - under building trust and awareness, I would add "Be available". This list is very much outgoing, but it's important to be available to the people you are trying to build trust with when they want to reach out to you, when they could use your help. Sometimes this is just a matter of answering a specific question or concern about your project. Other times it's serving as the starting point to help them go elsewhere in the organization for information or contacts. My best relationships were those that went two ways.
- Jennifer - Be transparent about decision-making: along the lines of the first point under success, I would add something about full lifecycle transparency around the decisions that are being and have been made, the priorities and limitations that are engaged as the project progresses.

What are the opportunities for regional collaboration around our individual efforts to develop long-term relationships and build capacity? What are the potential benefits of collaboration – for public agencies and for communities?

- Erin shifted us to the next question - we are interested in hearing about what people see as the opportunities for regional collaboration around this work to build long-term relationships and community capacity
- Gary – **New Portlanders program** in City of Portland - outreach to newcomer and refugee communities, identify cultural liaisons or ambassadors and put together a stipend program to support them, turning committee into a commission which will have different powers; awesome model; have cultural liaisons in place and they are doing the work
- Gary – **Age-Friendly Multnomah County and Portland initiative** - identified 10 action areas to make this a community for all ages; focused on 5 to start with; started second conference framed around building a community for all ages; expectations and relationships; accomplished our purposes because it got attention of the political structure; shared out about progress since last year at second event; workshops and discussions; will be an ongoing thing; the other subtext should be all cultures; real chance for cross-jurisdictional collaboration; issues that affect all communities and cultures – AARP taking it national
- Aaron – Metro provided some additional funding for our involvement in **Powell/Division** to do additional culturally relevant outreach, helped us go from project that was just okay to one that won an award; seed money; something like **Nature in Neighborhoods grant program** that anyone in the region could tap into, could be a cool resource down the road
- Mike – standardized demographics to create regional baseline – use to assess community needs
- Aaron – can jurisdictions get access to Opt In program? List of CBOs that you can sort by theme?

- Aaron – I'm trying to compile a list of community based or culturally responsive list that are in Gresham; could have an Opt In for CBOS to have one source of contact information; could search and then get a list; if Metro did it, I would use it everyday
- Heather – currently Metro does allow partners to get our Opt In data; but if we could partner in on the cost for other tools or resources, it would help out
- Aaron – I could see us chipping in if it's a quality product

Cynthia Alamillo provides overview of the work she's doing to support this focus area

- Cynthia noted that she will be here on a volunteer basis and will be developing tools to support agencies in their efforts to establish and develop partnerships, researching and trying to put together a set of tools; wanted to see and hear your input; is this something that could be helpful? → Tools to help agencies do the work or tools that can help CBOs take initiative
- Example of tools – to maintain relationships we could create form and description of the CBOs
- Aaron noted that **Ecotrust** might have a tool like that
- Cynthia asked people to think of successful tactics that people have used that we can use and streamline to develop a tool, example exit surveys for CBO and agencies, partnership agreements, an inventory of CBOS, summary of previous involvement with agencies; so we don't recreate the wheel every time
- Aaron - best practices for online questionnaires would be helpful
- Melissa – a lot of us do email blasts, but one of the things we started to do is when we are sending it out track not only who is opening it, but when it is opened – what is the best time to send, how it is being read and how people are engaging with it. We put tons of links in our emails, but they are almost never activated
- Peggy – one tool that I'm using today is how to build a brand new relationship, almost a step by step, it sounds simple but there is a science to it
- Doug – and I would add, building brand new networks, how do we go about that
- Cynthia – there will also be handouts about what is a successful relationship
- Doug – also need to assess the network or outreach and figure out what don't we have
- Aaron – I have sensed some sensitivity from staff about how to talk to community groups, need some training around being opened to new experiences
- Jennifer – profile for CBOS – what are some ways that really work for reaching out to your community? Both qualitative and quantitative, give us examples of engagement that really worked well; might help you go into a meeting
- Aaron – would be nice to have a sense of who could give you a debrief
- Gary – the most important thing from my perspective would be to demystify this process, talking about building relationships, be genuine and reach out
- Jennifer (via email) - I would be curious to ask a CBO what information about their organization/engagement preferences/particular interests/etc. they would like to make available as a starting point for any potential public engagement effort. The stuff they want us to know before we contact them.
- Jennifer - Generally speaking, I would like to see more work around best practices for report-back methods and a specific report-back planning tool.

Next Steps

- Erin will send out a doodle poll to schedule the next meeting and ask via email how we would like to use the time in the next meeting