

Innovation Advisory Workgroup – long-term relationships and capacity building

October 8, 2015, 11:00 AM – 12:00 PM

Room 601

Participants: Olena Turula, Janet Lee, Becca Uherbelau, Mary Rose Navarro, Darwin Eustaquio, Cassie Salinas, Cliff Higgins, Cynthia Alamillo, Peggy Morell & Erin Pidot

Driving question: how can Metro develop and maintain meaningful long-term relationships with CBOs that work with underrepresented communities and promote capacity building within these communities?

Meeting goals:

- Define long-term relationships and capacity building and review current efforts at Metro to realize these goals
- Review and contribute to guiding principles for long-term relationships
- Brainstorm tools/resources needed to support long-term relationships

Meeting notes:

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

- **Draft definition of long-term relationships:** A mutually beneficial relationship between Metro and a community that is actively maintained beyond project-specific engagement and has the capacity to outlast any one staff member, elected official or community member.
- Cassie - Should capture the fact that the relationship between individuals is important – how to move benefits of one-on-one relationships to agency
- Cliff – not just project-specific, but department-specific
- Connect to Metro’s vision – to create “warm handoff” to next person
- Janet - Recognize differences in long-term relationships that need minimal effort vs. heavier investment of effort
- Cassie – recognizing cultural differences in “maintaining consistent” long-term relationships

Review relevant efforts at Metro – specifically focused on underrepresented communities

- Want to acknowledge that great work already happening in these areas and we’re not here to reinvent the wheel, but to learn from each other and move forward as an agency – **what are some examples from your experience of successful, long-term relationships with CBOs?**
- Janet – stuck at word successful, but we do have a lot of relationships with CBOs. One CBO that has been really successful is the **Urban League**. They are actively out there trying to build relationships and have the capacity to do it.
- Janet – First Opportunity Target Area (FOTA) – hiring from communities misplaced by the Oregon Convention Center - building relationships is crux of how to successfully recruit and hire people from historically disadvantaged communities, but this has been a challenge for a number of reasons. The economy has been good, managers have been really selective. Few apply and even fewer are hired.
- Need to figure out how to keep relationship knowledge when person leaves

- Becca – generate list of CBOs that we have been able to stay in relationship with and look at why successful – for example, Urban League has the infrastructure to reach out and build relationships – what are the necessary conditions (for Metro and for the CBO) for success?
- Janet – DEI has a list, youth engagement task force has a list, others probably have a list – could compile these
- Peggy – agency-wide inventory of CBOs we’ve worked with/feel we have ongoing relationship with.
- Peggy – DEI roundtable is a good starting point for this
- Olena – relationship with **Intertwined Alliance** is another example of a successful relationship. Common goal of connecting with nature. Common goal = another important condition for success. What are common agency goals in building long-term relationships?
- **Partners in Nature** has a number of strong relationships
- Cassie – making connections between CBOs and Metro leadership is critical to success
- Mary Rose – **Verde** is another successful example – came on board for project specific and grew into long-term relationship – received two Capital Grants for Cully Park and an RTO grant. Also awarded two contracts after the Levy passed – one through Connection with Nature and an RFP that solicited a CBO to help diversify the workforce for the restoration that is happening throughout our natural areas.
 - We have a rich and meaningful relationship with them now, but what will happen when contract ends? How to transfer knowledge from contract relationships to post-contract?
- Cynthia – communication tool needed so that when contract ends another project can take it over – transfer knowledge within agency – need to institutionalize this transfer process
- Becca – CRM will help with the data piece of this, but also need to develop the culture piece through meetings like this one
- Cliff – just recently that planning has been willing to tap into networks of advocacy agencies – hesitancy because we’re impartial – part of this is we need to look at who we’re not talking to
- Peggy – for future conversation – benefits of long-term relationships to CBOs – make list of these
 - After contract ends, why would CBO want to continue the relationship?
 - Ex. if advocacy organization, relationships are helpful; perhaps to stay connected to opportunities to join a committee or find employment
- Cliff – worth exercise to have people sit and say why these relationships are good for us. How do they benefit decision-makers, technical staff, our position in the region, etc.?
- Cliff - Is one of the principles that we see CBOs as effective liaisons to underrepresented communities? Are there benefits that we’re missing?
- Cassie – learning opportunity for staff – mutual-learning, capacity building on both sides of the relationship
- Mary Rose – that’s the approach that Partners in Nature takes
- Cliff – we recognize heritage months, but do we have exercises where we talk about how some people in communities feel about interacting with government? Learning opportunities for staff

- Cassie – DEI is starting to do some of this. Going to Household Hazardous Waste Facility and talking about indigenous communities – relationship between Columbus Day and Dia de la Raza
- Olena – there should be a place where these resources are for someone who just started doing the work → how institutionalize knowledge and understanding?

Review and contribute to guiding principles for long-term relationships

- Becca – global question: incredibly helpful for people doing the work, but also need higher level principles - agency-wide principles are different → ex. creating systems to share resources
- Cassie – feels like public engagement perspective
- Peggy – maybe we need two sets of guiding principles – one for people doing engagement and the other for agency – agency wide vs. staff specific
- Olena – principles speak more to building relationships than maintaining them
- Cynthia – what happens after? How to monitor or assess if it's good or bad?
- Becca – make it applicable to everyone, not just people who do engagement – how to frame so people can see themselves in it
- Cassie – tie to core values for agency-wide – look at the compass for this
- Becca – use principles to evaluate work
- Janet – create a matrix: agency-wide values, guiding principles, specific examples
- Olena – break down by - this is what agency can do and what you (staff member) can do to support this
- Cliff – agency-level – department-level – individual-level
- Olena – important question - what can agency do to support staff with this?
- Peggy – capacity building for both sides (community and Metro)
- Janet – building relationships works well for medium-sized CBOs, what about small and emerging CBOs?
- Becca – seeking and identifying gaps
 - Who's not represented?
 - Gaps in the relationship itself?
- Cliff –communicate across department/projects – is NAYA responding to you?
- Cassie – people who do engagement need to be good stewards of the agency - be aware of recruitment opportunities, etc.
- Mary Rose – needs to roll up to agency principle → support staff in getting out of project and learning about agency at large → richer partnerships. Will require a culture shift.
- Becca – let's provide staff with the tools

What are the organizational opportunities to institutionalize these guiding principles and push this work forward?

- We didn't get to this question, but will return to it during our next meeting

Next steps

- Erin will send out a meeting survey and notes
- Next meeting on Wednesday, October 21st from 11 – 12