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# Voices from the Region: Connecting Historically Underrepresented Communities to Metro's Decision-Making Process

Metro (Or.)

1000 Friends of Oregon

Portland State University. Hatfield School of Government. Center for Public Service

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*April 2016*

MAKING A  
GREAT  
PLACE



# Voices from the region

Connecting historically underrepresented communities  
to Metro's decision-making process

## Note

In April 2015, Metro and community partner 1000 Friends of Oregon received the Oregon Innovation Award from the Center for Public Service at Portland State University to develop an approach for better connecting historically underrepresented communities\* to Metro's decision-making processes. The award provided 1,000 hours of research, facilitation and consulting services from a Hatfield Resident Fellow and Center for Public Service staff.

Over the course of seven months, sixty-plus representatives from Metro, 1000 Friends, CPS and many other local partners and organizations came to the table to contribute their time and expertise to the innovation effort. See page 23 for a complete list of contributors. These recommendations reflect the outcomes of this participatory process and the actions it generated.

\*Based on data collected by Metro in the past, we know that people of color, people with low-incomes and youth are historically underrepresented in the agency's public engagement and decision-making processes. For the purpose of this work and in alignment with the Strategic Plan to Advance Racial Diversity, Equity and Inclusion, a racial equity lens was applied with the idea that "by addressing the barriers to meaningful participation experienced by people of color<sup>i</sup> in our region, we will effectively also address the barriers shared with other groups."<sup>ii</sup> In a parallel effort, Metro brought on Hatfield Resident Fellow Addie Shrodes to lead the co-creation of a youth engagement strategy, which also applies a racial equity lens.

### Metro

Whether your roots in the region run generations deep or you moved to Oregon last week, you have your own reasons for loving this place – and Metro wants to keep it that way. Help shape the future of the greater Portland regional and discover tools, services and places that make life better today.

### Metro Council President

Tom Hughes

### Metro Councilors

Shirley Craddick, District 1

Carlotta Collette, District 2

Craig Dirksen, District 3

Kathryn Harrington, District 4

Sam Chase, District 5

Bob Stacey, District 6

### Auditor

Brian Evans



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# Introduction

There's no shortage of opportunities to engage.

At any given moment, at least 30 separate public engagement efforts at Metro are generating thousands upon thousands of comments from residents across the three-county Portland region.

We want to know, How do you get around the region? What parks do you or your family visit most often? What should we do with the tons of trash that remain after reusing and recycling the rest? What day do you most often visit the zoo?

Through surveys, focus groups, community meetings and quick polls, we ask what people think, believe and experience as residents of the region. We even ask how well we're asking the questions that will inform the policymakers who make the decisions.

And this is what we found – the voices of communities most often impacted by the decisions being made are underrepresented in our public engagement and decision-making processes.

While we're getting smarter about the tools we use and the channels through which we engage, overall, the people we hear from through our engagement efforts are predominantly White residents of Multnomah County, age 35 to 54, with four or more years of college.<sup>iii</sup>

We are fortunate as an agency – and a region – to have public engagement staff doing extraordinary work in several project specific efforts that are addressing barriers to meaningful and inclusive public engagement for communities of color, people with low income, English language learners, older adults and youth.<sup>iv</sup>

But there's more work to be done.

Through the Oregon Innovation Award, presented in April 2015 to Metro and 1000 Friends of Oregon, 1,000 hours of research, facilitation and consulting services from a Hatfield Resident Fellow and CPS staff was provided to explore and develop a strategy – as an agency – for connecting communities of color to Metro's decision-making processes.

In our role as regional convener, innovator and collaborative leader, Metro used the resource of time, focus and expertise that came with the award to collaborate with internal staff and our community, city and county partners to shape these recommendations for arriving at decisions that better reflect the racial diversity of our region.

*We even ask how well we're asking the questions. And this is what we found.*

## Voices from the region

On a regular basis, Metro reaches out to people of the Portland region through an online survey to ask about their experience engaging with the agency: What types of activities have they participated in, how do they like to be engaged, and how much – or how little – are they aware of what Metro is and does?

What we heard in surveys from 2013 was that while people felt Metro generally does a good job explaining the goals of engagement, it could do a better job showing how feedback influences project outcomes and decisions.<sup>v</sup>

*Too often it feels like the public input process is used to fulfill a legal requirement, rather than to actually listen to and process citizen input.*

*Greater confidence that my participation has any kind of impact.*

*A clear understanding of how my input would be used. Citizens desire to know where the opportunities exist for them/us to impact the actual decision. Otherwise our input feels like it will be used capriciously by whichever side of the issue finds it sympathetic.*

At three separate engagement activities held in 2014 and 2015 with culturally, ethnically, racially and income diverse community members, we asked about their experience participating in Metro's public engagement activities.<sup>vi</sup>

*While it's good that the voices of our membership are heard, we don't have much control in the larger process.*

*Our electeds don't look like us – how can our decision makers really represent our communities?*

*Why as Native Americans don't we have a bigger voice in politics in the metro region as we have a large population?*

*Messaging must be put in a context that low-income communities and communities of color understand. How will this project affect their daily lives?*

*I don't like hearing about budget issues in response to a question I have.*

The input from our community partners came with a sense of urgency that drew a bright line from public engagement to community outcomes and left little room for anything less than a shift within our agency around how we build and sustain relationships with the people we serve.

*Q. What do you need to live more comfortably?*

*A. We need to be heard. We need to see actions after we are heard.*

## Re-imagining public engagement

*Voices from the Region: Connecting historically underrepresented communities to the decision-making process* recognizes the ongoing efforts of Metro staff and our local government partners to develop public engagement strategies, best practices and tips for making our decision-making processes more meaningful and inclusive.

The intent in developing the recommendations offered in *Voices from the Region* is to take advantage of the momentum generated by these efforts to inspire a deeper consideration of how we can collaborate more closely as an agency and provide leadership to the region.

We began by re-imagining what public engagement could look like across the agency and the region, informed by input from our community, city and county partners. We witnessed a new expectation emerge from our discussions for initiating, building and sustaining long-term relationships with those partners. From listening deeply to community voices, we identified the assumptions necessary to support this new expectation.

The resulting set of recommendations call for realigning existing resources and being intentional about investments that prioritize relationship and capacity building for both staff and community to engage. In place of a five- or ten-year goal, most if not all of the recommendations proposed can be initiated in the first two years of implementation. Many of the recommendations are informing the draft Strategic Plan to Advance Racial Equity, Diversity and Inclusion. Others are being directly incorporated into the work plan for Metro's Community Relations Division.

This approach leverages the critical work of ongoing diversity, equity and inclusion efforts within Metro. It acknowledges the input received over the last several years from community partners working on issues of environmental justice, equity, public health and transportation advocacy that engage with Metro. And it incorporates the extraordinary work of local jurisdictions to develop inclusive public engagement and decision-making processes in their communities.

The following three principles guided the development of these recommendations and kept them actionable, effective and responsive to the conditions that exist in this moment.

1. **Acknowledge and support the momentum** of diversity, equity and inclusion efforts already underway within Metro.
2. **Build on input from community partners** as a starting point – not just a consideration – in developing recommendations.
3. **Lift up and reference the work of local partners** to advance inclusive engagement at the city and county level across the region to activate, not duplicate, efforts.

*Don't show me another report, tell me what you're going to do* Community member in response to consultant's report

## Question Stand Speak Act

The framework used to organize these recommendations is inspired by a vision for “the open space of democracy” within which the public – and the public sector – is called to Question, Stand, Speak and Act.<sup>vii</sup>

In that spirit, we’d like to thank our community partners for their commitment and willingness to explore with us how to improve our engagement processes in order to reach those most often impacted by the plans and policies Metro is responsible for implementing.

We offer a deep sense of gratitude to the Oregon Innovation Award selection committee and Center for Public Service staff for inspiring this journey with their vision for addressing the public service challenges that compromise trust in our public agencies. Their investment in this work, willingness to listen deeply, and openness to building new partnerships provided a leadership model from which we continue to learn.

We began this journey with our community partner, 1000 Friends of Oregon, based on a trusted relationship grown over years. They were willing to join us in submitting an application to the Oregon Innovation Award from a desire to work together to improve the engagement efforts in which they are so often a part. Their support of this work by committing many hours of staff time and leadership of Sam Diaz, community engagement coordinator, provided the direction for meaningfully exploring engagement and decision making by working side-by-side with community.

Our co-workers at Metro and colleagues in the cities and counties of the Portland metropolitan region who share a commitment to public engagement and community building continued to push us by being generous with their experience and knowledge. Their contributions made our work relevant and actionable and, in several cases, are driving its implementation.

Finally, we’d like to acknowledge the Metro Council; Martha Bennett, Chief Operating Officer; and departmental leadership for prioritizing this and other efforts to advance diversity, equity and inclusion within Metro and across the region. The meaningful change that this report envisions cannot happen without their continued leadership.

For a complete list of the sixty-plus community and jurisdictional partners and Metro staff members who volunteered their time to participate in the innovation process and whose insights form the foundation of this report, see page 23.

*Erin Pidot, Hatfield Resident Fellow*

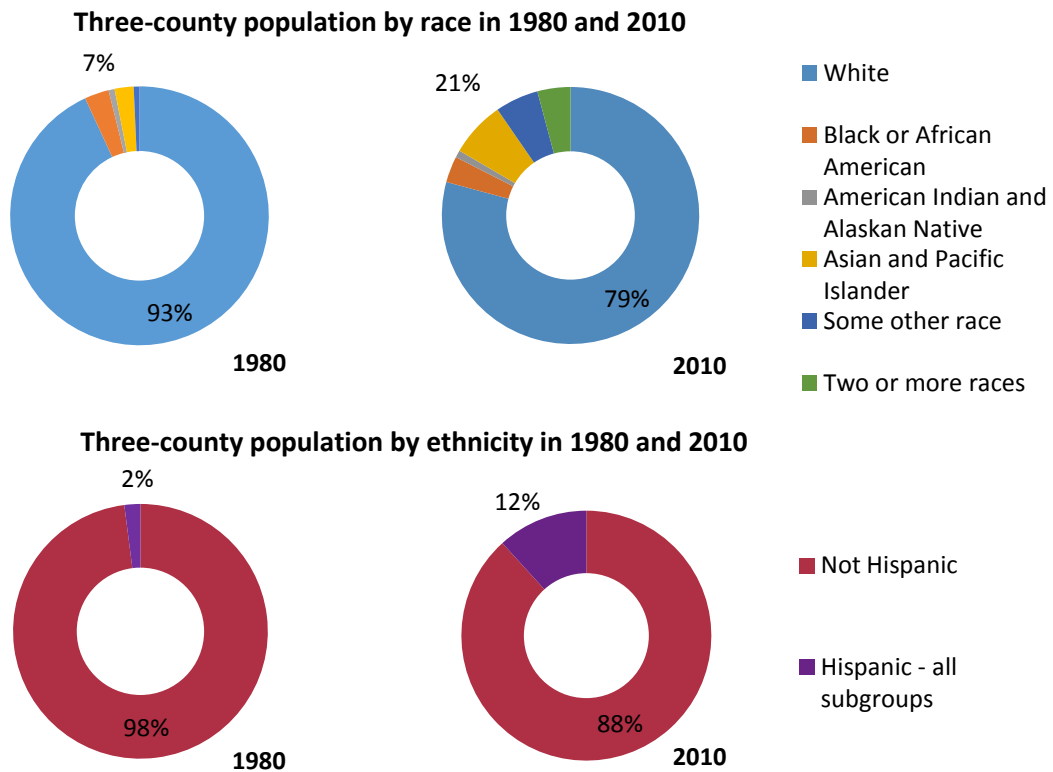
*Peggy Morell, Senior Public Affairs Specialist*



# 1 QUESTION

The work behind *Voices from the Region* began with three questions: Who is left out of our decision-making processes? What needs to change inside our agency? And how will we measure the change we hope to inspire?

## Who is left out of our decision-making processes?



Data taken from the Minnesota Population Center, National Historical Geographic Information System, available at [nhgis.org](http://nhgis.org). Prior to 2010, US Census options did not include "two or more races" or other choices for mixed-race people. In 2010, the percentage of the regional population selecting this option represented 4%. "Hispanic" includes those identifying as Mexican, Puerto Rican, Cuban or "other Hispanic or Latino."

While it is not uncommon to come across references to "our changing region" to express a population growing in size and racial, ethnic and age diversity, the bigger truth is we've already changed.

As shown by the data, by 2010 the demographics of the Portland metropolitan region had already shifted dramatically from the 1980 census. Despite this shift, communities of color remain underrepresented in the agency's public engagement results.

While our traditional engagement methods are successful in reaching the region's White non-Hispanic population, participation rates for communities of color suggest these methods have been inadequate.

## What needs to change?

*Our thoughts are taken, but we are left behind*

*Sheila Amoo, Community organizer  
Coalition for Intercultural Organizing*

As a long-range planning agency looking to the future in 2040, Metro's projects and plans have extended planning horizons with updates often required every five years or so.

For many stakeholders such as local government partners and the community-based organizations that are invested in project or plan outcomes, this means public engagement efforts that can last for years.

The extended timeline provides opportunities to continuously evaluate engagement practices and outcomes throughout the process, and reflect on and learn from the rich feedback generated. Drawing on findings from five external assessments<sup>viii</sup> of Metro's engagement efforts over a five-year period, three themes emerged:

- Metro's project-focused culture prompts repeated periodic engagement efforts with community-based organizations rather than sustained engagement and relationship-building over time.
- Planning public engagement efforts using traditional tools, activities and processes produces only incremental change in reaching communities of color in Metro's decision-making and leaves opportunities to build long-term relationships behind.
- Without clear participation goals and performance measures for inclusive and meaningful public engagement, along with a standardized monitoring approach, efforts to reach communities of color cannot be measured or improved.

The Oregon Innovation Award provided the focus and resources of time and expertise to answer the question, *What needs to change?* It called for a co-creation approach that brought together the voices and experience of Metro staff and leadership, local government partners, community organizers and the innovation team from the Center for Public Service.

The results of the seven-month engagement produced a new expectation for a public service culture that listens deeply to community voices and invests in existing and new relationships with communities of color historically left behind in engagement and decision-making processes. With a new expectation and assumptions for how we build and sustain relationships that reflect community priorities and values, five outcomes of the work emerged that set the direction for the change inspired by new voices from the region.

## How will we measure the change we hope to inspire?

*I don't know the numbers, but I know the experience*

*Nicole Phillips  
OPAL Environmental Justice, Bus Riders Unite*

The question heard most often throughout the development of a strategy for engaging communities of color was, *How will we know we have made a difference?*

Measuring what matters starts with identifying the outcomes we hope to achieve. Setting a new expectation for how a public agency builds enduring relationships with the communities it serves calls for creating measures and identifying indicators that capture the subjective intangibles of trust, a sense of ownership in the engagement process, an expectation of being heard, and a belief that decisions will reflect the racial diversity of the region.

The challenge in setting a new expectation for inclusive public engagement then becomes how to balance a dependence on data sets to measure success with an openness to measures expressed through the stories and experiences of the people most often directly impacted by the decisions that are made.

*Voices from the Region* offers five co-created outcomes for meaningful, inclusive engagement, 15 strategies to achieve them, and more than 40 actions to get us there. Our success will be measured by a recently standardized set of demographic questions used agency wide to establish a baseline of who we're hearing from, who is being left behind, and where there's work to be done. The impact of those efforts, however, must be measured by more than numbers.

With community organizers in leadership roles in a workshop format, senior Metro staff sat side-by-side with advocates promoting transportation access, public health, affordable housing, the environment, and issues impacting older adults and youth to answer questions and explore together how decisions are made at Metro, who are the influencers, and when to advocate.

From that workshop emerged a set of more than 50 community-sourced measures for meaningful and successful public engagement that now provide the foundation for developing new measures of success and a starting place for designing public engagement plans the support a new expectation for what inclusive engagement can look like.

The work to be done by Metro staff is reaching a common understanding of how to incorporate qualitative measures of trust, ownership, respect and partnership with community in a continuous evaluation of our public engagement efforts.

For a complete list of community-sourced measures for meaningful and successful public engagement, see pages 38 and 39 in the resource section.

## 2 STAND

### The Oregon Innovation Award

The simple act of applying to the 2015 Oregon Innovation Award was a response to voices from the region heard through the ongoing evaluation of agency engagement efforts by Metro staff.

The award recognizes the active pursuit of a breakthrough innovation through collaborative partnerships between government agencies or nonprofit organizations and the Center for Public Service at Portland State University.

As defined by the Center, a public sector innovation is a policy, process, product, service or method of delivery that is new or significantly improved for the organization using it. The innovation provides a way of resolving a public service challenge that both outperforms previous practices and improves public outcomes.

With leadership from a Hatfield Resident Fellow matched by CPS to the winning public service challenge, the following questions were developed to guide the innovation and shape the resulting recommendations:

- Can we combine existing processes in new ways?
- Can we set new expectations for co-creating solutions with community?
- Are there new opportunities to connect community members directly with decision-makers?
- How can we introduce new actors into our public engagement and decision-making efforts?
- What is the potential for recommendations to influence Metro's policies and practices?
- How well do the recommendations address the challenges faced by our growing region?
- To what extent can the recommendations be implemented with limited resources?
- Is there value in the recommendations for local government partners?

For Metro and its community and government partners, the innovation lives in the process of co-creation, learning from the leadership of community organizers, bringing decision makers and community members together, and developing community-sourced measures to help define our success.

To learn more about the Oregon Innovation Award, visit the Center for Public Service website at <http://www.pdx.edu/cps/oregon-innovation-award>.

## 3 SPEAK

### Setting a new expectation

*Working side by side, Metro connects historically underrepresented communities to the decision-making processes that impact their lives, bringing voices to the table that inspire innovative solutions to the emerging challenges of a growing region.*

Envisioning an inclusive public engagement and decision-making process asks that we set a new expectation for what engagement can look like. At the heart of the recommendations that follow is the belief that enduring relationships are built when community members, staff, leadership and elected officials learn and work side-by-side. Through direct engagement, community members can speak to the impacts of agency plans and policies in their neighborhoods. Decision makers have the context to more meaningfully consider what they've heard. Most importantly, a personal connection can be made from looking together at the issues that shape life in the Portland metropolitan region.

### Leading with new assumptions

To meet a new expectation for engagement requires new assumptions for how we build and sustain relationships that reflect community priorities and values.

#### **Recognize and value community expertise**

We recognize and value the expertise of the people we serve about their own lived experiences and the communities with which they identify.

#### **Acknowledge social, historical and institutional context\***

We acknowledge the social, historical and institutional context in which we operate and own our role in it as a public agency and as individuals.<sup>ix</sup>

#### **Open the door between community and decision-making\***

We open the door between community and decision-making by creating opportunities for community to connect directly with elected officials, in neighborhoods and at the decision-making table.

#### **Listen deeply**

We promote authentic dialogue by setting the expectation that community will be heard and their input thoughtfully considered.

#### **Serve the public**

We approach our work, distribute our resources, and design our decision-making processes with a first responsibility to the people we serve.

*\* Strategies and actions directly inspired by the "Equity Baseline Report: A Framework for Regional Equity," prepared by Metro's Equity Baseline Technical Advisory Group in January 2015.*

# 4 ACT

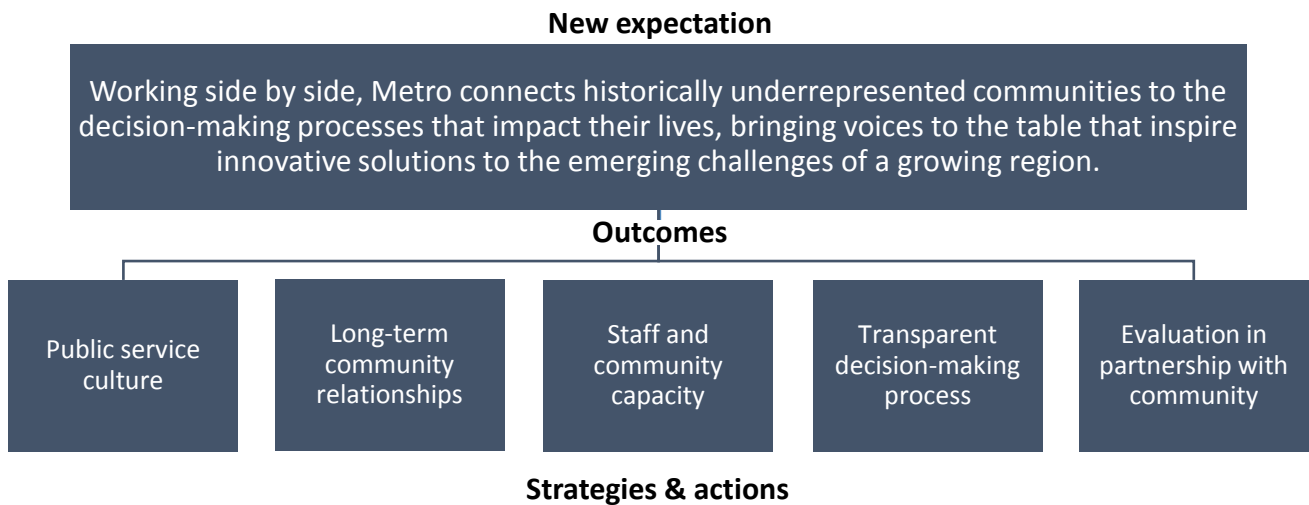
## Recommendations to the region

Being intentional in engaging with communities historically left behind in public engagement and decision-making processes transforms our understanding of what is possible.

A new expectation for inclusive, meaningful engagement asks that we reconsider our assumptions and identify outcomes informed by community, staff and leadership. The actions that take us to these desired outcomes are offered:

- in service to all people in the region
- as a responsibility of our partnerships with communities
- in our role as a regional resource
- as a public agency.

Five co-created outcomes follow that will collectively help fulfill this new expectation for meaningful engagement, along with recommended strategies and actions needed to achieve them.



*Strategies marked with \* are directly inspired by the "Equity Baseline Report: A Framework for Regional Equity," prepared by Metro's Equity Baseline Technical Advisory Group in January 2015.*

## In service to the people

### Outcome A public service culture that listens deeply to community voices

#### Strategies

Prioritize community identified needs and solutions.\*

Formally recognize the importance of relationship and capacity building.\*

Create opportunities for community members to work and learn side-by-side with staff, leadership and elected officials.\*

#### Actions

Create opportunities within public engagement plans for decision makers to meaningfully consider community needs and solutions and discuss what they've heard.

Work hand-in-hand with the Public Engagement Review Committee to support their work in advancing inclusive public engagement and decision-making practices.

Contract with a community-based organization to co-create a template for an inclusive public engagement plan and implement what it looks like for their community.

Include relationship building as a duty in job descriptions and performance evaluations.

Provide method for staff to assess, plan for, track and report on the community expertise and time required for a successful project or decision-making process.

Institute an annual recognition activity to honor community partners and invite all community-based organizations that have partnered with Metro to attend.

Design leadership forums with a role for emerging community leaders to work side-by-side with decision makers to inform the Regional Transportation Plan update.

Support the development of a "public engagement to public service" pathway through a Metro 101 module that can be integrated into existing community leadership programs.

Hold workshops for staff, leadership and community members to come together and learn about foundational topics such as Metro decision-making, transportation funding and land use planning.

**Public service culture** A values-based culture of service built on a commitment to build awareness in community about the issues and processes of government and incorporate community values into decision-making.

## As a partner

**Outcome** Long-term community relationships developed through meaningful engagement

### Strategies

Provide staff with the time and resources necessary to develop community relationships outside of project-specific engagement.

Support staff in serving as conduits to connect community members to resources, leadership, employment, public engagement and service opportunities across the agency and the region.

Treat every public engagement and networking effort as an opportunity to develop a long-term relationship between communities and the agency.

### Actions

Maintain a record of community-based organizations' involvement with the agency to support internal succession planning and relationship continuity as project, leadership and contacts change.

Create a staff time tracking code for relationship building with community.

Create staff time allowances for volunteering in the community.

Implement annual public engagement forums to connect community-based organizations to resources, engagement opportunities, and contracting opportunities at Metro and other public agencies across the region.

Continuously expand the reach of staff, committee and volunteer recruitments through outreach to community partner networks, with particular attention to communities of color.

Lead with a list of Metro's core competencies in a partnership role to set an expectation for the capacity and resources Metro brings to new and existing partnerships.

Educate staff, leadership and elected officials about the importance of long-term relationships and their role in establishing and maintaining them.

Develop a relationship strategy for community-based organizations that aligns engagement and networking with agency priorities for increasing awareness and building trust.

Identify relationships with community-based organizations as new, sustaining or in transition to apply strategies and resources that best serve the organization.

**Long-term relationship** A mutually beneficial relationship between a public agency and a community that is respectful of the community's history and culture, tailored to the needs and goals of the community, actively maintained beyond department or project-specific engagement, and able to outlast any one staff member, elected official or community member.



## As a resource

**Outcome** Staff and community have the capacity necessary for meaningful engagement.

### Strategies

### Actions

Build community capacity with every public engagement effort.\*

Create a quick guide on how to get involved in Metro's work and participate in the decision-making process.

Co-create with community an inclusive public engagement plan template that supports staff in managing a full public engagement life cycle tailored to the needs of the community.

Allocate funding within each department to compensate community members and community-based organizations for their time and expertise through stipends, contracts and grants.

Streamline processes and make ongoing investments to help overcome barriers and support community participation.\*

Establish a centralized point-of-contact for community members and community-based organizations interested in Metro's public engagement opportunities.

Create an accessible community portal on the Metro website that features information on employment, volunteer, grant, contract, committee and public engagement opportunities.

Implement annual public engagement forum to connect community-based organizations to resources, engagement opportunities, and contracting opportunities at Metro and other public agencies across the region.

Prepare staff, leadership and elected officials to work effectively with all communities.

Set the expectation for staff participation in ongoing opportunities within Metro to learn about diverse cultures in the region, unconscious bias, and racism through requiring management attendance.

Create an online regional public engagement resource library that includes public engagement guides and reports, findings from community input, best practices, tool-kits and other resources from Metro and our partners.

Create opportunities for culturally-specific community-based organizations to share information about their community and successful engagement strategies with Metro and local partners.

**Agency capacity** A public agency's ability to effectively and sustainably engage with a community.

**Community capacity** A community's ability to effectively and sustainably engage in the work of a public agency.

## As a public agency

**Outcome** A transparent decision-making process that is relevant, accessible and responsive.

### Strategies

Support community members in navigating the decision-making process.\*

Ensure staff understand the decision-making process and their role in it.

Clearly communicate to community members how their input effects decisions.\*

### Actions

Create a quick guide for community-based organizations and residents on how to get involved in Metro's work and participate in the decision-making process.

Create an online, interactive decision-making graphic for use by community partners who want to learn about Metro's decision-making process.

Use plain language to describe projects, policies , programs and the decision-making process.

Implement workshops for staff, leadership and community members to come together and learn about foundational topics such as Metro decision-making, transportation funding and landuse planning.

Tap the public engagement skills and experience of staff to build capacity within the agency through peer-to-peer workshops.

Create a central portal where staff can access all resources related to the big picture of what Metro does, how decision-making works, and how communities can connect with the agency.

Create and promote standardized methods for staff to incorporate a full feedback loop into their public engagement plans.

Create a database of stories about how community input has successfully influenced decisions and use these stories in public engagement efforts.

**Decision-making** All the actions, conditions and processes within an agency that influence public policy decisions.

## As a public agency

**Outcome** Public engagement and decision-making processes are evaluated in partnership with community.

### Strategies

Continually assess public engagement efforts using a standardized evaluation framework.

Set clear and measurable public engagement goals that incorporate both quantitative and qualitative measures.

Regularly share evaluation results with community, staff, leadership and elected officials.

### Actions

Develop a set of standard survey tools for use with communities to evaluate public engagement efforts throughout the life of a project.

Implement a standard survey for staff to evaluate the public engagement process at the end of every project.

Implement an annual survey of community-based organizations that have interacted with Metro over the course of the year.

Use newly standardized demographic questions for surveys and establish methods for annually aggregating results for agency-wide public engagement efforts to identify voices we're missing.

Annually review and discuss evaluation results and identify goals for improvement with public engagement staff.

Train staff on how to incorporate evaluative thinking into the planning process and the importance of using community-sourced measures of success.

Synthesize, evaluate and report on information gathered through staff and community partner surveys in the annual Public Engagement Report and on the website.

Build in annual opportunities for Metro staff and community members to provide feedback on evaluation methods and indicators used to measure success.

Reflect on evaluation results with the Public Engagement Network on an annual basis and discuss how results can shape programs and processes going forward.

**Community-sourced evaluation** Evaluation grounded in community expressions of success.

# 5 LEAD

## Making the case for investment

The Oregon Innovation Award provided Metro and its community and local government partners with the resources of time and expertise to bring voices to the table historically left behind in our decision-making processes.

In doing so, it called us to lead.

Leaders emerged at every turn. Their passion and creativity provided direction and prompted new conversations about what outcomes were desired, what needed to change, and what actions were needed at the individual, community, agency and regional level.

Beyond the innovation and collaboration, however, lay the greatest responsibility we assumed as leaders – making the case for investment in the strategies and actions we endorsed.



Making the case begins with mapping desired outcomes to benefits by showing what needs to change and how it will be accomplished. Measuring the impact of those actions requires an investment of time and partnership with staff, leadership and community to identify both the data-driven, quantitative indicators and the more intangible, qualitative indicators that reflect the outcomes you wish to achieve.

For the decision-maker with budget authority, making the case demonstrates what success looks like based on shared values and priorities, and can provide incentive for future investment.

## Leading from where you are

Whether you are an elected official, planner, community organizer or park visitor, you can activate meaningful change. The Oregon Innovation Award called on staff at Metro, 1000 Friends of Oregon and partnering organizations to do just that. Here are examples of people leading from where they are within the timeline of the award.

### **First joint meeting of community organizers and Metro senior staff**

Sam Diaz, Community Engagement Coordinator at 1000 Friends of Oregon, planned and facilitated a meeting for community advocates and Metro staff and leadership to discuss public engagement and decision-making practices. Metro staff provided an overview of the decision-making process and community advocates shared experiences engaging with Metro and other public agencies. Participants then identified ways to increase access for communities of color to the decision-making process. We heard from both Metro staff and community advocates that this was their first opportunity to sit side-by-side and problem solve together.

### **Hands-on learning: Evaluate your engagement and partnership efforts**

Noelle Dobson, Senior Public Affairs Specialist, participated in the innovation advisory work group on evaluation and was inspired to take it to the next level. She hosted a series of three workshops in early 2016 for staff to practice applying evaluative thinking to their engagement and partnership work. Twenty-two staff members across five departments participated, and the outcomes will inform the Community Relation Department's effort to create an agency-wide public engagement evaluation framework.

### **Annual regional engagement forum**

Olena Turula, Associate Planner in the Parks and Nature department, participated in the innovation advisory work group on long-term relationships and capacity building and had the inspiration for an annual public engagement forum. The idea quickly gained traction among staff, leadership and community partners. This forum will serve as a venue for representatives from community based organizations, local and regional governments and the general public to learn about upcoming engagement opportunities; share success stories, challenges, ideas and best practices; and network. The first forum is anticipated to take place in 2016.

### **RTP Regional Leadership Forums**

As part of the 2018 Regional Transportation Plan update, the Metro Council will convene a series of Regional Leadership Forums to foster leadership and collaboration, discuss policy priorities and public input in an integrated manner, and provide policy direction to shape the development of the 2018 RTP update. In the past, the forums brought members of the Metro Policy Advisory Committee and the Joint Policy Advisory Committee on Transportation to the table. Peggy Morell, Senior Public Affairs Specialist, proposed expanding these forums to include community and business leaders representing voices not always heard at the decision-making table. Metro is now working to identify such leaders to join the conversation.

## 6 LEARN

*Voices from the Region* builds on the innovative work already taking place within Metro and across the region to advance inclusive public engagement and decision-making. This approach leverages the building momentum for change and serves to activate, not duplicate, efforts. Examples of efforts that directly inspired the recommendations included in this report follow.

### Innovation within Metro

#### **Strategic Plan to Advance Racial Equity, Diversity and Inclusion**

The Strategic Plan to Advance Racial Equity, Diversity and Inclusion is an organizing framework initiated by the Metro Council in 2012 to incorporate and apply equity more consistently across its program, policies and services in collaboration with community, city and county partners.

Scheduled for completion in June 2016, this strategic plan is built around five long-term goals that were directly informed by community, jurisdictional partners, as well as Metro staff. The goals will direct Metro in creating specific objectives, actions and measures of evaluation and accountability as the agency works to help the Portland area reach its equitable and prosperous destination.

Download the draft Strategic Plan to Advance Racial Equity, Diversity and Inclusion and learn more about the agency's equity initiatives on the Metro website at [www.oregonmetro.gov/public-projects/equity-strategy](http://www.oregonmetro.gov/public-projects/equity-strategy).

#### **Diversity Action Plan**

The Diversity Action Plan helps Metro identify ways to value diversity and demonstrate cultural competence in carrying out its mission. A living document that is subject to regular review and revisions, the plan identifies goals, strategies and actions in four areas: internal awareness and sensitivity to diversity issues, employee recruitment and retention, public involvement and citizen advisory committee membership, and procurement.

The plan was developed by an interdisciplinary team of Metro staff, and is based on organizational needs and feedback from employees and community groups. It was adopted by the Metro Council on Nov. 15, 2012. Download the Diversity Action Plan and learn more about this initiative on the Metro website at [www.oregonmetro.gov/regional-leadership/diversity-equity-and-inclusion/diversity](http://www.oregonmetro.gov/regional-leadership/diversity-equity-and-inclusion/diversity).

#### **My Place in the Region**

Planning and Development has refocused its activities to better reflect community, economic and demographic trends. Prioritizing local partnerships with cities, counties and community-based organizations, the department has launched "My place in the region," a communication strategy that better connects people to planning issues and decisions that shape our future.

### **Identity project**

One major challenge Metro faces in its public outreach and engagement is an extensive lack of public awareness—many residents are either completely unaware or confused about what the agency does. In 2016, Metro will launch an improved visual identity to create a cohesive look and feel, reflect the agency’s personality and approach, and ultimately build public awareness and trust. The new identity will include an inclusive and welcoming voice and visuals to encourage participation from all residents across the region.

### **Youth Engagement Strategy**

Hatfield Resident Fellow Addie Shrodes led the co-creation of a strategy for inclusive youth engagement in collaboration with a task force of 20 staff members and a network of 35 community and jurisdictional partners. The strategy is a collective vision to develop civically and environmentally engaged young leaders from historically underrepresented communities who have the knowledge, skills and capacity to shape their careers, communities and government. Three interconnected focus areas provide a range of goals, objectives, action items and recommended resources to coordinate practices and meet goals across the agency and the region.

## **Innovation from the region**

### **Leadership for Equity, Diversity and Inclusion Council**

Clackamas County

The council envisions a county in which equity and inclusion are at the forefront of all decision-making, and in which all community members are actively engaged. Specifically, the council strives to examine county processes in order to recommend and facilitate changes that foster greater inclusiveness, develop leadership from diverse communities, increase community participation in county government, and promote and support diversity awareness and education.

<http://www.clackamas.us/childreneyouthandfamilies/diversity.html>

### **Diversity outreach workshops**

Multnomah County

The Multnomah County Citizen Involvement Committee hosts 90-minute lunch-and-learn workshops where community-based organizations share strategies for conducting outreach to the communities they serve. Discover the lessons learned from these workshops in the committee’s handbook *Global Outreach in Local Communities*, available on the Multnomah County website at [multco.us/oci/global-outreach-local-communities](http://multco.us/oci/global-outreach-local-communities).

### **Aloha-Reedville Study and Livable Community Plan | The BUILT Game**

Washington County

The Aloha-Reedville Study and Livable Community Plan used a place-making game to educate community members about neighborhood planning and development choices in English, Spanish and Somali. Learn about this and other innovative engagement strategies in the Aloha-Reedville Public Involvement Final Report, available on the Washington County website at [www.co.washington.or.us/alohareedville](http://www.co.washington.or.us/alohareedville).

## **New Portlanders | Community Engagement Liaisons Program**

City of Portland

The Community Engagement Liaisons Program equips community members from vulnerable and underserved neighborhoods with collaboration and advocacy skills, creating a link between their communities and the city government. CELs bring these skills back to their community and serve as interpreters and facilitators for public involvement activities. Learn about this and other innovative engagement programs on the City of Portland's Office of Neighborhood Involvement website at [www.portlandoregon.gov/oni](http://www.portlandoregon.gov/oni).

## **Powell-Division Transit and Development Project**

Metro, City of Portland, City of Gresham and others

More than half of the 22-person Powell-Division steering committee are community members and include small business, environmental justice, health, education and affordable housing interests.

Committee members use a consensus-based approach for decision-making. Learn about the project on the Metro website at [www.oregonmetro.gov/public-projects/powell-division-transit-and-development-project](http://www.oregonmetro.gov/public-projects/powell-division-transit-and-development-project) and check out the steering committee decision-making model on page 29 in the resource section of this report.

## **Community Engagement Spectrum**

Kaleidoscope Consulting

Kaleidoscope Consulting designed the Community Engagement Spectrum as a tool to help organizations analyze power relationships with communities and identify ways to increase community ownership, not simply participation, in project design and implementation. In a workshop for Confluence Environmental Center, AmeriCorps members used the spectrum to assess practices at their partner organizations, develop concrete actions to make community engagement more meaningful, and encourage authentic power sharing for more sustainable results. To find out more about these tools and workshops visit [meetkaleidoscope.com/resources](http://meetkaleidoscope.com/resources), and check out the Community Engagement Spectrum on page 28 in the resource section of this report.



## Partners in co-creation

### **Innovation core leadership team**

Sam Diaz, Community Engagement Coordinator, 1000 Friends of Oregon

Marcus Ingle, Program Manager and Professor, Center for Public Service at PSU

Peggy Morell, Senior Public Affairs Specialist, Metro

Erin Pidot, Hatfield Resident Fellow, Metro & Center for Public Service at PSU

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Grace Cho, Planning, Metro

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Melissa De Lyser, Department of Land Use and Transportation, Washington County

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Lisa Frank, Bicycle Transportation Alliance

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Luis Nava, Latino Leadership Network & Washington County Citizen Action Network

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Jennifer Sexton, Hana Research

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Carolyn Lee, Consultant

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Gresham Community Involvement Committee  
Mee Seon Kwon, Center for Intercultural Organizing  
Multnomah County Citizen Involvement Committee  
Beth St. Amand, Oregon State University Extension Service, Washington County  
Tara Sulzen, Office of Congressman Earl Blumenauer  
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Metro Public Engagement Network  
Metro Public Engagement Review Committee  
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George Winborn, Senior Public Affairs Specialist, Communications

## Endnotes

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- <sup>i</sup> For the purpose of this work and in alignment with the Strategic Plan to Advance Diversity, Equity and Inclusion, the terms “people of color” and “communities of color” include Native Americans, African Americans, African and Slavic immigrants, Asian Americans and Pacific Islanders, and Latinos or Hispanics. Although “officially” identified as White by the United States Census, the Slavic immigrant community has been included because their overall well-being and health outcomes are experienced through a lens of racism.
- <sup>ii</sup> “Strategic Plan to Advance Racial Equity, Diversity and Inclusion – DRAFT,” Diversity, Equity and Inclusion team, Oregon Metro, Winter 2016, p. 8. <http://www.oregonmetro.gov/public-projects/equity-strategy>
- <sup>iii</sup> Opt In – Portland-Vancouver Area Online Participation Tool, [optinpanel.org/whos-joined](http://optinpanel.org/whos-joined)
- <sup>iv</sup> IAP2 International Core Values Awards Winner 2015. Project of the Year 2015 – IAP2 USA Winner – Metro, Portland, “Powell-Division Transit and Development Project”
- <sup>v</sup> Quotes taken from “Metro Opt In – Public Engagement Survey,” DHM Research and Opt In, June 2013.
- <sup>vi</sup> Quotes taken from Metro Equity Strategy Discussion Groups and “Community Advocate Reflections on Current Engagement Practices”, collected by Sam Diaz at 1000 Friends of Oregon, 2015 and . This document is available on page 40 and 41 in the resource section of this report.
- <sup>vii</sup> Williams, Terry Tempest, “The Open Space of Democracy.” Wipf and Stock Publishers, 2004.
- <sup>viii</sup> Five external assessments include: 1) “Public Engagement: Strengthen capacity to improve results,” Office of the Auditor, September 2010. 2) “Metro Climate Smart Communities Scenarios Project: Stakeholder comments on engagement with EJ/Equity/Public health leaders,” February 2014. 3) “2014 RTP and 2015-18 MTIP Environmental Justice and Title VI Assessment: Overall findings, public comments, and recommendations,” July 2014. 4) “Equity Baseline Report: A Framework for Regional Equity,” Equity Baseline Technical Advisory Group, January 2015. 5) Alamillo, Cynthia, “Community Partnership: A strategic approach to support long-term relationships with community-based organizations,” September 2014.
- <sup>ix</sup> Inspired by the “Equity Baseline Report Part 1: A Framework for Regional Equity,” Equity Baseline Technical Advisory Group, Metro Oregon, January 2015. [www.oregonmetro.gov/equity-framework-report](http://www.oregonmetro.gov/equity-framework-report)

## Resources

The following section is a collection of resources from our partners, along with resources co-created by Metro staff and community and local partners during the development of the innovation recommendations. All resources are related to the general theme of inclusive public engagement and decision making.

We would like give special thanks to Mary Fifield at Kaleidoscope Consulting, Cynthia Alamillo, Dana Lucero at Metro and Dr. Marcus Ingle at the Center for Public Service for allowing us to feature their tools.

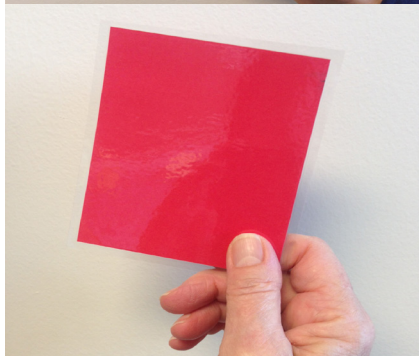
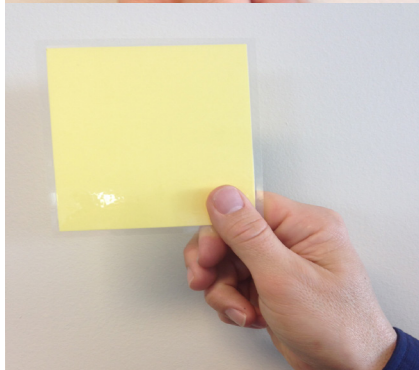
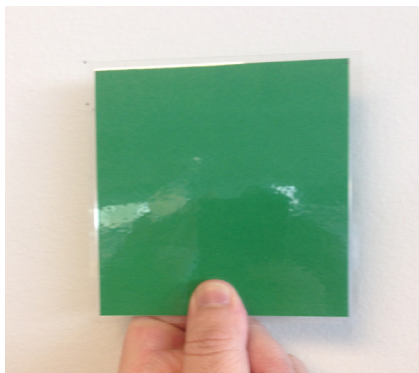
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# MEETING PROTOCOLS AND DECISION MAKING PROCEDURES

Confirmed March 17, 2014

## MEETING PROTOCOLS

- Arrive on time
- Actively listen to public comments
- Actively listen to each other
- When you want to speak, stand your name tent up on end
- Be mindful of how long you speak
- After the meeting, let staff know if there is anything that would help you feel more comfortable participating



## DECISION MAKING

The Steering Committee will use a consensus-based approach for decision making, meaning decisions move forward because they are supported by members but are not necessarily the favorite choice of each individual member.

**Step 1:** A committee discussion will follow the presentation of technical information and community input. After questions are answered and concerns are discussed, there will be a call for consensus and you will be asked to indicate your level of support for a proposed decision by raising a color card.

**Green** I support this.

**Yellow** I have concerns that will need to be addressed or am skeptical, but I will not block this.

**Red** I do not support this.

**Step 2:** People who raised yellow cards will share their concerns. These will be recorded and may include:

- Considerations that should be addressed as the project moves forward
- Modifications or additions to the decision
- General statements you want included in the meeting record

**Step 3:** People who raised red cards will share:

- Based on the yellow card discussion, whether they would still raise a red card
- Considerations that should be addressed or modifications to the decision that would move them from a red card to a yellow card

**Step 4:** If the proposed decision has substantively changed, you will be asked to indicate your level of support by raising a color card.

**Reaching consensus:** A proposed decision with modifications or additions will be confirmed upon reaching consensus, as indicated by green and yellow cards.

Consensus is not the same as unanimity. Following a good faith discussion, the committee may choose to move forward with red cards remaining. Red card concerns will be addressed moving forward to the greatest extent possible.

Should the committee be fundamentally divided, alternatives will be developed based on the issues raised and new proposals will be brought back to the committee for consideration. If the committee remains divided, the proposals will be separated into elements; those with support will move forward. For the unresolved elements, the co-chairs will answer the question: Can the project move forward with uncertainty on this element? If certainty is needed, the committee will determine an appropriate voting method.

# Community Engagement Spectrum

What role do community members play in...

## Developing Community Projects

- ✧ Use services/product
- ✧ Help implement & evaluate projects
- ✧ Help design projects
- ✧ Lead project design, implementation & evaluation
- ✧ Secure funding

Recipient

Participant

Owner

## Shaping Public Policy

- ✧ Receive information about policy decisions
- ✧ Receive information about how to participate in decision-making
- ✧ Participate in decision-making
- ✧ Make recommendations that shape policies
- ✧ Identify policy gaps, advocate for policy review, make recommendations that shape new policies

## Organizational innovation readiness assessment tool

Created by the Center for Public Service at Portland State University

The innovation team completed this assessment, created by the Center for Public Service, at the beginning of the process to assess Metro’s readiness for innovation in the realm of inclusive public engagement and decision-making.

Organizational innovation enabling conditions	Assessment Questions	Comments and rating of degree to which conditions are present (5 = high; 1 = low)
1. Individual preference for taking responsible risks to better serve the public good.	1.1. Do the executive leaders and leading innovators embrace an entrepreneurial spirit and risk taking? 1.2. Does your organization explicitly give priority to risk taking in its policies, procedures and everyday practices?	
2. Organizational (or unit) culture actively encourages experimentation including learning from both successes and failures.	2.1. Does your organization encourage experimentation and pilot efforts that are “out of the box” in order to foster adaptability and agility? 2.2. Does your organization’s policies and values support an open learning culture that embraces generative learning from both successes and failure?	
3. Embedded organizational policies and practices for recognizing and rewarding innovation.	3.1. Do your organization’s policies (including the vision, mission, values and strategies) explicitly value organizational (breakthrough/radical) innovation? 3.2. Does your organization make consistent and effective use of both intrinsic (e.g. inspirational motivation, individual autonomy, intellectual stimulation, etc.) and extrinsic (e.g. contingent financial rewards, etc.) incentives related to innovation?	
4. Organization’s operational priorities reflect external demands for performance innovations.	4.1. Are specific demands of clients and constituents for innovation clearly reflected in organizational budget priorities? 4.2. Does your organization actively co-produce operational budgets that embrace needed public service innovations with clients and constituents?	



**Organizational innovation readiness assessment tool cont'd.**

<b>Organizational innovation enabling conditions</b>	<b>Assessment Questions</b>	<b>Comments and rating of degree to which conditions are present (5 = high; 1 = low)</b>
<p>5. Explicit organizational procedures and practices to sunset current administrative processes and technologies as innovations are implemented.</p>	<p>5.1. Does your organization have a robust procedure for examining and effectively phasing out current processes, technologies and human resources in relation to proposed innovations?</p> <p>5.2. Does your organization have procedures for securing buy-in from externally impacted clients and constituents for legacy processes and technologies when innovations are being considered and implemented?</p>	
<p>6. Robust external and internal performance feedback loops related to the innovation in operation.</p>	<p>6.1. Do leaders/managers responsible for major innovations receive continuous and real time performance information (e.g. organizational productivity, inclusiveness, responsiveness and/or reliability) related to those innovations?</p> <p>6.2. Does your organization give operational priority to communicating the benefits/value of your innovations with internal and external clients/constituents?</p>	

## Organizational readiness checklist for inclusive public engagement and decision-making

The organizational readiness checklist is designed to guide an organization in assessing its overall readiness to meaningfully engage communities historically underrepresented in the decision-making process. The items included are based on input received from Metro staff and community partners. This is not intended to be a comprehensive list, but rather a tool to facilitate dialogue and identify opportunities for improvement.

Readiness category	Checklist
Capable and diverse front-line staff	<ul style="list-style-type: none"> <li>• Capable public involvement staff with capacity to implement public engagement strategies</li> <li>• Staff with demonstrated active listening and cross-cultural relationship building skills</li> <li>• Staff that reflect the diversity of the community the agency serves</li> <li>• Capacity building opportunities for staff to learn from one another and continue to develop knowledge and skills that will assist them in conducting inclusive public engagement</li> </ul>
Strong and diverse leadership that support the work	<ul style="list-style-type: none"> <li>• Inclusion engagement and relationship-building included in job descriptions and performance reviews</li> <li>• Willingness to allow community to participate in decision-making, not just provide input</li> <li>• Clear vision and mission that calls for community to actually inform decisions</li> <li>• Value community input on same level as other stakeholder input and technical analysis</li> <li>• An agency that values relationships as much or more than projects</li> <li>• Culture of engagement within the agency</li> <li>• Willingness to take risks and be wrong</li> <li>• Budget dedicated to public engagement</li> <li>• Willingness to be transparent about decision-making reality</li> <li>• Willingness to go into the community and engage through meetings, cultural events, etc.</li> <li>• Leadership that reflect the diversity of the community the agency serves</li> </ul>
Clear and inclusive outreach and engagement strategies	<ul style="list-style-type: none"> <li>• Inclusive outreach and engagement strategies and tools for staff to use</li> <li>• Inclusive outreach and engagement (across age, race, ethnicity, language, income, geography, etc.)</li> <li>• Creative, relevant and accessible engagement strategies that have been directly informed by the community</li> <li>• Engagement opportunities that have value for community members—build capacity, social capital, etc.</li> <li>• A range of ways to engage and provide input</li> <li>• Opportunities to engage at locations within the community</li> <li>• Methods for showing appreciation of community expertise, time and effort</li> </ul>
Dedicated resources for outreach and engagement	<ul style="list-style-type: none"> <li>• Translation services</li> <li>• Resources to help community members overcome barriers to participation (stipend for transportation, child care, lost wages, food, etc.)</li> <li>• Incentives to participate Grants for community-based organizations to engage the community</li> </ul>

## Organizational readiness checklist cont'd.

Readiness category	Checklist
Clear evaluation strategy	<ul style="list-style-type: none"> <li>• Definitive goals and measureable outcomes</li> <li>• Standardized tools to collect quantitative and qualitative data</li> <li>• Common understanding of indicators and how they will show when progress is made</li> <li>• Staff capacity to evaluate their engagement efforts on an ongoing basis</li> <li>• Staff and leadership capacity to reflect on evaluation outcomes and make changes</li> </ul>
Relationships with community members, leaders and institutions	<ul style="list-style-type: none"> <li>• Strong relationships across different communities and community-based organizations</li> <li>• Sustained focus on relationship building</li> <li>• Commitment to expanding the agency’s network—not limiting engagement to the same community members and community-based organizations who are most often involved</li> </ul>
Agency knowledge of the communities trying to reach	<ul style="list-style-type: none"> <li>• Correct identification of all pertinent stakeholders</li> <li>• Clarity on which decisions are most relevant to the community and why</li> <li>• Updated database of community connectors</li> <li>• Knowledge of existing community meeting places and spaces</li> <li>• Knowledge of community’s history and relationship with agency</li> </ul>
Community awareness of the agency and capacity to engage effectively	<ul style="list-style-type: none"> <li>• Engagement opportunities advertised in accessible and meaningful ways</li> <li>• Agency presence at community events—letting people know about opportunities</li> <li>• Neighborhood-based information kiosks or materials at libraries, community centers, places of worship, etc.</li> <li>• Multiple languages on materials including fliers, website, etc.</li> <li>• Efforts to build community capacity, including support of community-based leadership development programs and a clear explanation of the agency’s decision-making process</li> </ul>
A transparent public engagement and decision-making process	<ul style="list-style-type: none"> <li>• Clear explanation of the opportunities to engage and help inform decisions</li> <li>• Clear expectations of role of community input and impact on outcomes</li> <li>• Consistent report-back strategies for input received</li> <li>• Easy point(s) of contact for the community at the agency</li> <li>• Tools to explain the decision-making process in common, simple language</li> <li>• Staff knowledge of the decision-making process and ability to connect community members to opportunities and leadership across the agency in meaningful ways</li> <li>• Willingness to say “I don’t know but I will find out and get back to you” and then following through</li> </ul>
Opportunities for community members to participate in the decision-making process	<ul style="list-style-type: none"> <li>• Seats on committees dedicated for community members</li> <li>• Opportunities for community members to share their input and stories directly with decision-makers</li> <li>• Opportunities for community leaders to sit side-by-side with decision-makers to help inform decisions</li> </ul>

## Strategies for developing long-term relationships

This table provides goals and strategies to guide public agency efforts to build long-term relationships with community-based organizations that serve historically underrepresented communities.

Goals	Leadership-level strategies	Staff-level strategies
Build trust and awareness	<ul style="list-style-type: none"> <li>Empower staff to spend time establishing and maintaining community relationships outside of project-specific engagement.</li> <li>Provide resources and opportunities for staff and leadership to learn about underrepresented communities.</li> </ul>	<ul style="list-style-type: none"> <li>For new relationships, lead with an interest in learning about their organization and community's needs and priorities instead of a request for feedback or involvement in an agency activity.</li> <li>Select, schedule, attend and participate in cultural celebrations, community events and volunteer work days as part of an engagement plan to build relationships outside of project activities.</li> <li>Use research and previous engagement summaries to learn of cultural and community preferences for engaging with government agencies.</li> <li>Acknowledge community expertise as well as time and energy that CBOs and community members invest in the process.</li> </ul>
Be responsive to community needs	<ul style="list-style-type: none"> <li>Provide opportunities for staff to discuss successes and challenges and come up with innovative new practices.</li> <li>Create a system for review of public engagement plans</li> <li>Compensate community members for their time and expertise.</li> </ul>	<ul style="list-style-type: none"> <li>Ask community the level of engagement desired at the beginning of a project using an inform/engage/collaborate spectrum with examples of what that level of engagement looks like for your project.</li> <li>Plan for a complete engage/collect/report-back cycle in public engagement plan.</li> <li>Be flexible and seek out innovative approaches to engagement</li> <li>Use community input from beginning of process to inform engagement.</li> </ul>
Recognize the history of the relationship	<ul style="list-style-type: none"> <li>Create and maintain systems to easily share information and track partnerships over time.</li> </ul>	<ul style="list-style-type: none"> <li>Maintain a timeline of community involvement with the agency to share as community leadership or contacts change over time.</li> <li>Be aware of other agency investments in a community you are working with such as</li> </ul>
Coordinate and connect across the agency	<ul style="list-style-type: none"> <li>Support staff in stepping back from their project to gain a deeper understanding of the agency at-large and the range of opportunities for communities to engage.</li> </ul>	<ul style="list-style-type: none"> <li>Seek opportunities to collaborate with staff working on other projects in the same community to build recognition of a coordinated approach.</li> <li>Serve as a conduit to other staff, leadership, and opportunities instead of a gatekeeper.</li> </ul>

## Strategies for developing long-term relationships cont'd.

Goals	Leadership-level strategies	Staff-level strategies
Be transparent about decision-making	<ul style="list-style-type: none"> <li>• Create tools that clearly explain the decision-making process and opportunities to get involved.</li> </ul>	<ul style="list-style-type: none"> <li>• Set appropriate expectations about when and how community input will be used and be transparent about the decision-making process.</li> <li>• Report back to the community about the outcomes of the process and how their input was used.</li> </ul>
Build community and staff capacity	<ul style="list-style-type: none"> <li>• Invest in staff and community capacity building.</li> <li>• Identify and address agency-wide barriers to engagement and relationship building.</li> </ul>	<ul style="list-style-type: none"> <li>• Use relationships as a mutual-learning opportunity to build internal capacity to effectively serve the community, and external capacity to effectively participate in the agency's decision-making.</li> <li>• Identify and address barriers to engagement and relationship building.</li> </ul>
Evaluate and improve partnerships over time	<ul style="list-style-type: none"> <li>• Implement a strategy for assessing and monitoring relationships with underrepresented communities.</li> </ul>	<ul style="list-style-type: none"> <li>• Assess who is missing from the table and pursue partnerships with CBOs or community leaders trusted in those communities.</li> <li>• Collaborate with partners to monitor and assess the quality of the relationship and effectiveness of public engagement efforts.</li> </ul>

## Six stages of a partnership between a public agency and a community-based organization

By Cynthia Amarillo

Stage	Partnership context	Strategic questions	Tools	Tactics
<b>Outreach</b> <i>Explore the connection between the community and Metro</i>	<ul style="list-style-type: none"> <li>• There is a need to engage specific communities to increase inclusive public involvement in the decision-making process</li> <li>• The agency has a desire to develop relationships with CBOs to strengthen agency and community capacity</li> <li>• Exploration of CBOs is in progress</li> </ul>	<ul style="list-style-type: none"> <li>• Do we have representation from the communities we want to engage?</li> <li>• Who can we approach to reach the communities we want to engage?</li> <li>• What existing community networks or channels can we use to engage?</li> </ul>	<ul style="list-style-type: none"> <li>• Exploratory meetings</li> <li>• Inventory of CBOs that agency has partnered with in the past</li> </ul>	<ul style="list-style-type: none"> <li>• Formal and informal communication</li> <li>• Committees and advisory boards</li> <li>• Galas, volunteer opportunities and other events</li> </ul>
<b>Identify need</b> <i>Identify and discuss short and long-term interests for Metro and the CBO</i>	<ul style="list-style-type: none"> <li>• There has been initial contact with potential partners</li> <li>• The agency and the CBO share a desire to explore a partnership</li> <li>• The agency may have a history with the CBO (through past or current contracts, grants, sponsorships, projects, etc.).</li> </ul>	<ul style="list-style-type: none"> <li>• What is the need for a partnership?</li> <li>• Do we have the capacity and resources to create a partnership?</li> <li>• What are the short-term or project-specific benefits of the partnership for the agency, the CBO, and the community at large?</li> <li>• What are the long-term benefits for the agency, the CBO, and the community at large?</li> </ul>	<ul style="list-style-type: none"> <li>• Guiding principles for a long-term partnership</li> <li>• Summary of CBO's previous involvement with the agency</li> <li>• List of benefits of long-term relationships for agency and CBO</li> <li>• Potential partnership assessment tool</li> <li>• SWOT Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Formal and informal communication</li> <li>• Opportunities to learn about CBO and their community members</li> </ul>
<b>Establish</b> <i>Define partnership guidelines</i>	<ul style="list-style-type: none"> <li>• There is a clear understanding of the value of a partnership and the intention of developing trust and a meaningful relationship.</li> <li>• There is a clear understanding of the capacity and resources of both partners.</li> <li>• There is a concrete opportunity to collaborate.</li> <li>• There are dedicated resources to determine responsibilities and expectations; timelines; and communication, monitoring and evaluation strategies.</li> </ul>	<ul style="list-style-type: none"> <li>• What is the goal for the partnership?</li> <li>• What is the action plan to achieve these goals?</li> <li>• What is the decision-making process?</li> <li>• What are the guidelines for communication and reporting back?</li> <li>• What are the guidelines to monitor and evaluate the partnership collaboratively?</li> <li>• What are the expectations around how to sustain the partnership after completion of the goals?</li> </ul>	<ul style="list-style-type: none"> <li>• Partnership agreement</li> <li>• International Association for Public Participation (IAP2) Spectrum of Public Participation</li> <li>• List of methods for collecting qualitative and quantitative data</li> </ul>	<ul style="list-style-type: none"> <li>• Contracts, grants and sponsorships</li> <li>• Multiple-language documents</li> <li>• Listening to and using feedback received</li> <li>• Co-creating engagement and evaluation plans</li> </ul>

Six stages in a partnership cont'd.

Stage	Partnership context	Strategic questions	Tools	Tactics
<b>Maintain</b> <i>Continue interactions to build mutual trust</i>	<ul style="list-style-type: none"> <li>Community members are becoming more engaged.</li> <li>The agency and CBO have further aligned their vision.</li> <li>There is open and clear communication among partners.</li> <li>Partners are proactively developing strategies for partnership sustainability.</li> </ul>	<ul style="list-style-type: none"> <li>What is the partnership maintenance plan?</li> <li>Are there enough resources to maintain the relationship and achieve the goals?</li> <li>Is the CBO or community interested in connecting with other opportunities within the agency?</li> </ul>	<ul style="list-style-type: none"> <li>Questionnaire to identify what element of the partnership is critical to sustain</li> <li>Partner Profile</li> </ul>	<ul style="list-style-type: none"> <li>Formal and informal reviews</li> <li>Retreats</li> <li>Feedback by email or phone</li> </ul>
<b>Monitor and evaluate</b> <i>Monitor and evaluate objectives</i>	<ul style="list-style-type: none"> <li>Engagement process is evaluated on both an ongoing basis and post-completion.</li> <li>Partners have clear measures of success.</li> <li>Partners use feedback to inform future engagement processes.</li> </ul>	<ul style="list-style-type: none"> <li>What is the process to monitor and evaluate performance?</li> <li>What is the process to address the results?</li> <li>What is the strategy to maintain communication between partners?</li> <li>How is the partnership going overall? What's working and what can be improved?</li> </ul>	<ul style="list-style-type: none"> <li>Standardized forms to collect and share data</li> <li>List of performance measures</li> <li>Partnership evaluation template</li> <li>Surveys and interviews</li> </ul>	<ul style="list-style-type: none"> <li>Documentation of meetings and outcomes</li> <li>Open dialogue about what's working and what could be improved</li> </ul>
<b>Transition and renew</b> <i>Discuss issues of conclusion and transition</i>	<ul style="list-style-type: none"> <li>Agency and CBO have identified other partners to collaborate with to further engage community members.</li> <li>Agency and CBO have successfully engaged a broad base of community members with different goals</li> <li>Agency and CBO are moving beyond the initial goal of the partnership</li> <li>Initial goal of partnership has been reached</li> </ul>	<ul style="list-style-type: none"> <li>Are there new partners to involve?</li> <li>How does this partnership fit into agency-wide strategies?</li> <li>Are there resources from partner organizations and other entities throughout the community that can be leveraged?</li> <li>Is the CBO interested in engaging in other opportunities across the agency?</li> </ul>	<ul style="list-style-type: none"> <li>Exit survey for CBO and agency staff</li> <li>Reflection tool to capture key achievements, challenges and lessons learned</li> </ul>	<ul style="list-style-type: none"> <li>Connect to other opportunities and resources at the agency</li> <li>Final reports</li> </ul>

## Community-sourced evaluation measures

Community-sourced evaluation measures is a list of reflections gathered from community members on how they measure meaningful and successful public engagement. Community reflections are organized by target outcomes for Metro’s public engagement.

Target outcomes	Community-sourced measures
Communities have the capacity to effectively engage with Metro as advocates, program partners, volunteers, committee members, contractors, employees, etc.	We were compensated for bringing our experience and knowledge to the project
	We know how to find out about other Metro programs and activities that are important to our community
	We understand resources and priorities of Metro
	A trusted CBO was contracted to do engagement within our community
	We know how to continue to be engaged in this subject
	Staff came early in the process with accessible information and meaningful ways to engage
	We always felt we had the information we needed to stay involved
	Day, time and location of activities were accessible
	We understood the language and concepts used during activities
	Materials were clear and in a language that we could understand
Metro and community partners have authentic, long-term relationships	We have a role in shaping the activities and methods used by Metro
	We have a stronger relationship with Metro than we did before
	We have new relationships with Metro
	Engaging with Metro is valuable for us
The broader community* is connected to Metro and understands our work	We were recognized for bringing our experience and knowledge to the project
	Our community is aware of Metro and the opportunities to get involved
	We have a better understanding of what Metro is and what it does
	We can tell others about what Metro does
	We understood the purpose of engagement
	We now know Metro staff members we can contact if we have questions
Community partners understand Metro’s decision-making process	Many of our community members now feel comfortable contacting decision-makers directly
	We understood what decisions were being made at the end of the process
	Metro set clear and realistic expectations about how our input would be used
	We understood how input was actually used
	The subject matter and the decision-making process was explained to us in plain language

\*Broader community meaning a broader reach and lighter touch than our relationships with community partners



**Community-sourced evaluation measures cont'd.**

Target outcomes	Community-sourced measures
Historically underrepresented communities are fully participating—and perspectives represented—in Metro activities*	A lot of people from our community participated
	Our community is aware of opportunities to participate
	Opportunities are accessible to our community
	The people involved were as diverse as our community (race, age, gender, homeownership status, etc.)
	There were many opportunities to engage
	Activities were held in our community
Communities have a positive experience engaging with Metro	We felt ownership over the process and outcomes
	We were confident in the process and outcomes
	Engaging with Metro was worth our time and energy
	We felt safe, welcome and encouraged to participate
	We felt comfortable providing input freely and without judgement
	We felt welcome and safe, not judged
	We will invite and/or encourage others to participate next time
	We will participate again/repeat participation
	Staff uses effective methods to share input
	Activities were interesting, engaging and culturally appropriate
	Activities felt relevant and authentic
	Our input was valued
Decisions are more reflective of community input	Staff understood our concerns and listened to our input
	We felt heard by decision-makers as well as staff
	We had influence over the outcomes
	Staff understood the issues that were important to our community
	The decisions made felt relevant and responsive to our community's needs
Staff, leadership and committee membership reflect the diversity of the communities that Metro serves	The staff and leadership we interacted with were as diverse as our community
	More people from our community found quality, respectful employment at Metro
	More people from our community now sit on Metro committees
	Our community members who work or serve on a committee at Metro feel welcome and have had positive experiences

\*Activities include engagement activities, public meetings, committees, volunteer opportunities, venues, parks, etc.

## Community advocate reflections on current engagement practices

Collected by Sam Diaz, former community engagement coordinator at 1000 Friends of Oregon

The following is a collection of reflections from community advocates on how to make current engagement practices more appropriate, respectful and effective. These reflections highlight key issues regarding government and quasi-government agencies' public engagement strategies. Issues are broken down into categories in order to provide a framework for brainstorming solutions. It is important to note at the outset that there are many great engagement strategies being employed by the public sector. This list, however, focuses on areas for improvement. Our belief is that we should always be checking our work and striving to do better. This list is not exhaustive of all reflections related to engagement, but provides a solid starting point for the innovation work to address.

### General elements of public meetings

The day and time of meetings is usually when people are at school or at work. It's hard to justify going to a public meeting where I wait for a long time to get 3 minutes to say what I want.

I don't understand the facilitation process: why did the facilitator talk more than the people?

People who facilitate don't understand what it means to be transit-dependent. I can't open up to someone about this in a public space.

I feel like a lot of the public meeting flew right over my head (more on this in Section 3).

My neighborhood association has a lot of people that understand what the government is doing. That's really helpful but they don't bring other people along. I don't feel welcome in the conversation and I'm not able to contribute much.

My neighborhood seems pretty opposed to protecting renters. Most of them are homeowners that have lived there for a long time.

The presentation was not interesting or engaging. Talking at me for an hour, giving paper after paper to me, and telling me another meeting to go to isn't helpful.

They didn't ask about demographics of people who are going to the meetings. How are we getting a sense of whose voice is heard? Who are *they*?

There was no follow-up on my survey. How did they decide what improvements to make? Not mine, I can see that.

I don't like hearing about budget issues in response to a question I have.

I don't like when a government office tells me to go to another government office in response to a question I have.

I would have liked to hear the challenge that's present in order to achieve the goal.

Wow...that group was NOT diverse at all (race, age, in some cases gender, homeownership status).

### Contracting: Paying for engagement flaw

Cost is too low for our non-profit to take on. The price doesn't include overhead costs or transportation costs for the project.

Contract negotiations are uneven.

While it's good that the voices of our membership are heard, we don't have much control in the larger process.

## **Community advocate reflections cont'd.**

Our contract emphasized listening sessions with quantitative goals. This is helpful but it doesn't place importance on the quality of the comments.

Community members don't make a relationship with decision makers.

Sometimes, I feel like the voices are being tokenized or that the agency is checking off a box because of what we are doing. We are sought after because of our ability to reach out to [specific] community members but a lot of the time we don't understand the subject matter.

## **Que dice? Language hurdles in public process**

*Issue 1: Language that is not English/Dialect*

Need translation for all materials.

I don't like contract translation (talking into a phone to serve as translation).

They didn't translate right. They kept editing words or using different words.

*Issue 2: Wonky Language*

Stop using acronyms. They are not helpful.

I don't understand the connection between my daily transportation needs and what I'm hearing today.

I don't understand what they said and I'm a person familiar with planning language.

I don't understand what they want from me- poorly worded question after technical conversation.

Checked out. Boring.

## **The obsession of committees and workgroups**

I sit on...5 committees...and don't get paid for it. While I realize this is somewhat of a civic duty, it's getting hard to understand the need for so many committees.

What authority do we have as a committee? Still don't understand.

Does this workgroup interact with the decision maker? This one doesn't seem to. Is this a waste of time?

Our Committee doesn't meet. It's dead. It's sad because it could be useful.

I would like it to be more interactive- can we meet with other committees that are working on the same subject.

This committee isn't diverse.

We are talking about public transportation and how many people are transit-dependent? How many people actually consistently use it? Not many.

Staff keep rotating. Not sure who to contact anymore. I would like consistency.

## **Lingering question of engagement to outcomes**

It's hard to justify this work to funders, donors or even community members. What sorts of things are being 'produced' so to speak?

It was great that the group of community members told the decision maker about their issue but how do we follow up? Still waiting.

We got a bus stop changed in the neighborhood after [tells story], and I still don't understand what to do when this is needed.

I feel like I'm sitting on a lot of committees but not sure if this is changing anything.

Last minute amendments or modifications are unacceptable. How does this respect the process? Who is responsible for these changes?

## Glossary of key terms

As used in *Voices from the Region: Connecting historically underrepresented communities to the decision-making process*

**Action step** A specific action an organization can take towards achieving a recommendation.

**Agency capacity** A public agency's ability to effectively and sustainably engage with a community.

**Community-based organization** A public or nonprofit organization that involves community residents in addressing human, educational, environmental and public safety needs. Community-based organizations may represent a specific identity, issue or geographic area and generally involve local residents identifying strategies to better serve their community.<sup>1</sup>

**Community capacity** A community's ability to effectively and sustainably engage in the work of a public agency.

**Community-sourced evaluation** Evaluation grounded in community expressions of success based on their experience of the activity, process or outcome.

**Co-creation** A collaborative process by a public agency and the communities it serves to identify challenges and develop and implement strategies towards achieving a shared vision.

**Decision-making** All the actions, conditions and processes within an agency that influence public policy decisions.

**Equity** Our region is stronger when individuals and communities benefit from quality jobs, living wages, a strong economy, stable and affordable housing, safe and reliable transportation, clean air and water, a healthy environment, and sustainable resources that enhance our quality of life. We share a responsibility as individuals within a community and communities within a region. Our future depends on the success of all, but avoidable inequities in the utilization of resources and opportunities prevent us from realizing our full potential. Our region's population is growing and changing. Metro is committed with its programs, policies and services to create conditions which allow everyone to participate and enjoy the benefits of making this a great place today and for generations to come.<sup>2</sup>

**Guiding principle** A shared belief that provides direction for what an organization does, and why and how it does it.

**Historically underrepresented community** A community that has been systematically underrepresented in government decision-making processes as a result of social, historical and institutional barriers. In response to current data collected by Metro, historically underrepresented communities for the purpose of this work include people of color, English language learners and people with low-income.

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<sup>1</sup> Definition taken from: Alamillo, Cynthia, "Community Partnership: A strategic approach to support long-term relationships with community-based organizations," Oregon Metro, September 2014, pg. 6.

<sup>2</sup> Metro's definition of equity, <http://www.oregonmetro.gov/regional-leadership/access-metro/equity>

## Glossary cont'd.

**Inclusion** Active and sustained efforts to overcome barriers to participation and meaningfully engage a representative set of people in the decision-making process, with specific attention to historically underrepresented communities that will be impacted by the outcome of a project or program.

**Long-term relationship** A mutually beneficial relationship between a public agency and a community that is respectful of the community's history and culture, tailored to the needs and goals of the community, actively maintained beyond department or project-specific engagement, and has the capacity to outlast any one staff member, elected official or community member.

**Public engagement** A two-way, interactive process between a public agency and the communities it serves that involves mutual learning with the goal of generating mutual benefits.

**Public participation** To involve those who are affected by a decision in the decision-making process through public meetings, surveys, open houses, workshops, polling, citizen's advisory committees and other forms of direct involvement with the public.<sup>1</sup>

**Public sector innovation** A new or significantly improved policy, process, product, service or method of delivery that is new to the organization using it, and provides a way of resolving a public problem or responding to user or citizen demands. The change starts with a creative idea that is collaboratively developed and adopted through an iterative process and results in systemic behavioral change that both outperforms previous practices and improves public outcomes.<sup>2</sup>

**Public sector breakthrough innovation** New ways to structure and deliver public services both vertically and horizontally that result in synergistic achievement of four organizational performance metrics: enhancing productivity, increasing inclusiveness, improving service responsiveness and ensuring reliability.<sup>3</sup>

**Public service culture** A values-based culture of service built on a commitment to build awareness in community about the issues and processes of government and incorporate community values into decision-making.<sup>4</sup>

**Recommendation** A short or long-term proposal for how to move a strategy forward.

**Strategy** A long-term plan of action designed to achieve a vision.

**Vision** An aspirational description of desired future outcomes to serve as a guide for action and decision-making.

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<sup>1</sup> The International Association for Public Participation's definition, available here: [www.iap2.org](http://www.iap2.org)

<sup>2</sup> The Center for Public Service at Portland State University's definition

<sup>3</sup> The Center for Public Service at Portland State University's definition

<sup>4</sup> Inspired by Lois Wise's definition, available in: "Public Personnel Motivation: The Concept of the Public Service Culture." *Public Administration: Concepts and Cases*. Comp. Richard Joseph Stillman. 9th ed. Boston: Cengage Learning, 2010. 340-351.

## Resource list

### **Inclusive public engagement practices**

*Aloha-Reedville Study and Livable Community Plan - Public Involvement Report* (April 2014) prepared by Washington County Project Staff, available at [www.co.washington.or.us/alohareedville](http://www.co.washington.or.us/alohareedville)

*Engaging and Serving Diverse Communities: Tualatin Hills Park and Recreation District Inclusive Outreach and Diversity Development Project Report* (July 2014) by Masami Nishishiba, Jillian Girard, Lisa Durden and Cynthia Alamillo at the Center for Public Service, Portland State University, available at [works.bepress.com/masami\\_nishishiba/](http://works.bepress.com/masami_nishishiba/)

*Engaging for Equity: A Report on Portland's Diversity and Civic Leadership Program 2007 – 2013* (January 2015) prepared by the Office of Neighborhood Involvement, City of Portland, available at [www.portlandoregon.gov/oni/66693](http://www.portlandoregon.gov/oni/66693)

*Global Outreach in Local Communities* (2015) prepared by the Office of Citizen Involvement at Multnomah County, available at [multco.us/oci](http://multco.us/oci)

*Report: Multicultural Community Forum* (June 2013) by Masami Nishishiba, Fern Elledge, Cynthia Alamillo, Charles Daniel, Anable Lopez-Salinas and Nicholas McCarty at the Center for Public Service, Portland State University, available at [works.bepress.com/masami\\_nishishiba/](http://works.bepress.com/masami_nishishiba/)

*Serving Diverse Communities – Cultural Competency* (July 2007) by Abraham David Benavides and Julia C.T. Hernandez at the International City/County Management Association, available at [icma.org/en/icma/knowledge\\_network/documents/kn/Document/6452](http://icma.org/en/icma/knowledge_network/documents/kn/Document/6452)

*Threshold 2008 Final Report* (March 2009) prepared by Threshold 2008, available at [threshold2008.org/Reports\\_SelectedDocuments.php](http://threshold2008.org/Reports_SelectedDocuments.php)

### **Evaluation**

*Framework and Tools for Evaluating Progress Toward Desired Policy and Environmental Changes: a guidebook informed by the NW Community Changes Initiative*, prepared by Ronda Zakocs, Noelle Dobson, Christopher Kabel & Suzanne Briggs, available at [www.nacddarchive.org](http://www.nacddarchive.org)

*Measuring the Success of Local Public Engagement* and other tools for assessing public engagement by the Institute for Local Government in California, available at [www.ca-ilg.org/assessing-public-engagement](http://www.ca-ilg.org/assessing-public-engagement)

### **Making the case for investment**

*Business Case for Inclusion and Engagement* by Marcus Robinson, Charles Pfeffer and Joan Buccigrossi, available at [www.workforcediversitynetwork.com](http://www.workforcediversitynetwork.com)

*Focus on Citizens: Public Engagement for Better Policy and Services* by the Organization for Economic Co-operation and Development, available at [www.oecd.org/gov/publicengagement/focus](http://www.oecd.org/gov/publicengagement/focus)

*Making the Case for Public Engagement: How to demonstrate the value of consumer input*, by Edward Andersson, Emily Fennell & Thea Shahrokh, available at [www.involve.org.uk](http://www.involve.org.uk)

## Resource list cont'd.

*Strategic Community Investment: A Good Practice Handbook for Companies Doing Business in Emerging Markets* by the International Finance Corporation, available at [www.ifc.org](http://www.ifc.org)

*What is Public Engagement & Why Should I Do It?* by the Institute for Local Government in California, available at [www.ca-ilg.org/document/what-public-engagement](http://www.ca-ilg.org/document/what-public-engagement)

### **Public Sector Innovation**

*Engaging Citizens in Co-Creation in Public Services: Lessons Learned and Best Practices* by Satish Nambisan and Priya Nambisan, available at [www.businessofgovernment.org](http://www.businessofgovernment.org)

*Trends and Challenges in Public Sector Innovation in Europe* by Lorena Rivera León, Paul Simmonds and Laura Roman, available at [www.technopolis-group.com](http://www.technopolis-group.com)

*Unleashing Breakthrough Innovation in Government* by Nikhil R. Sahni, Maxwell Wessel and Clayton M. Christensen, available at [ssir.org/articles](http://ssir.org/articles)