

Clackamas County
Department of Transportation
and Development

Framework for Engagement and Decision-Making with Underserved Populations

Table of Contents

Section 1. Introduction to Community Engagement	1
Why Community Engagement.....	1
Benefits of Community Engagement	2
Clackamas County Guiding Principles & Core Beliefs for Community Engagement	2
Spectrum of Community Engagement	3
Section 2. How to Use the Framework	5
Purpose of this Framework	5
Terms used in the Framework	5
How to Use this Framework & Support Resources.....	6
Key Issues: What we learned from the Community Profile.....	8
Section 3. Considerations & Recommendations.....	10
Phase 1. Considerations and Discussions Before Drafting the Engagement Plan	11
Phase 2. Create an Engagement Plan	18
Phase 3. Engagement Wrap Up and Reflection.....	25
Section 4. Performance Measures.....	29
Section 5. Appendices & Templates.....	31
Appendix A. Clackamas County Community Engagement Framework.....	32
Appendix B. Community Profile Overview	46
Appendix C. Tips for Honoring Multi-Faith Holidays (2025).....	49
Appendix D. Thematic Analysis FAQ	54
Template A. Phase 1 Notes: Initial Considerations & Discussion	68
Template B. Phase 2: Engagement Plan Template	71
Template C. Phase 3 Notes: Wrap-up & Reflection.....	80

Acknowledgements

Clackamas County Public Health Division

- Leah Fisher, Built and Natural Environment Analyst
- Armando Jimenez, Public Health Program Manager
- Jamie Zentner, Partnership and Equity Team Manager
- Roksolana Chukhrii, Eastern European Community Liaison
- Jessica Sandoval, Latine/x Community Liaison

Clackamas County Department of Transportation and Development

- Karen Buehrig, Long Range Planning Manager
- Jeff Owen, Principal Transportation Planner
- Anthony De Simone, Planner 2
- Rob Sadowsky, Transportation Safety Outreach Coordinator
- Cameron Ruen, Community Relations Specialist Senior

This project is funded by Oregon general fund dollars through the Department of Land Conservation and Development. The contents of this document do not necessarily reflect the views or policies of the State of Oregon.

Preface

The Transportation Planning Rule – 660-012-0120

The Oregon Administrative Rules (OARs) include specific guidance in Chapter 660-012 which outlines the rules for Transportation Planning within the State of Oregon. OAR 660-012-0120 provides guidance on how planning engagement should be done and includes specific actions that need to be taken so that public engagement and decision making is consistent with statewide planning goals. In addition, OAR 660-012-0130 outlines specific practices that are required to be followed so that there is increased emphasis on centering the voices of the underserved populations identified in OAR-012-0125.

When Clackamas County undertakes a major update of its Transportation System Plan, the OARs require that the county make a special effort to ensure that underserved populations are informed about the choices that will be made in the planning process, given a meaningful opportunity to inform the planning process and be given an equitable share of the decision making power over key decisions, to the extent possible.

Knowing the Transportation System Plan was expected to be updated starting in 2025, the Department of Transportation and Development partnered with the Public Health Division to create the Framework for Engagement and Decision Making with Underserved Populations (Framework).

Public Health staff, comprised of epidemiologists, analysts, and community partnership liaisons worked over a nine-month period to complete the equity analysis required by OAR 660-012-0135, verify information in the draft equity analysis with community organizations who serve underserved populations identified in OAR-012-0125, and use that information along with community partner input and team expertise to craft recommendations included in this Framework. This Framework can be used not only while updating the Transportation System Plan, but also with other transportation planning projects and with large-scale planning projects undertaken by the Department of Transportation and Development.

The intention or purpose of this Framework is to provide a concise introduction to community engagement, then outline specific steps that can be taken when creating and implementing an Engagement Plan for a project. The goal is to strengthen community engagement activities, increase participation and provide tips and considerations to support engagement and decision making with underserved populations.

Section 1. Introduction to Community Engagement

Why Community Engagement

Community engagement is a collaborative process and two-way dialogue with community members to address issues that impact them. It provides a platform for people to voice their opinions and influence the decision-making process. Community engagement that includes the perspectives, needs, and priorities of the entire community is the cornerstone of a successful public process and leads to better outcomes for both the community and Clackamas County. Community engagement, when done well, builds lasting relationships, increases trust in government, and creates a deeper understanding of the lived experiences of those who live, work and play in the Clackamas County region.¹

Community engagement aligns with Clackamas County's core values and is central to the strategic priority to ensure safe, healthy, and secure communities and to build public trust through good government. Our ability to successfully fulfill this priority will require ongoing investments in community involvement and engagement efforts.²

Clackamas County Core Values³

Clackamas County employees work to serve the public and enrich our community. In that spirit, staff hold themselves accountable to the following standards at all times and in all interactions with community:

- Service
- Professionalism
- Integrity
- Respect
- Individual Accountability
- Trust

¹ Clackamas County. Clackamas County Community Engagement Framework. <https://dochub.clackamas.us/documents/drupal/72aacb47-a5b1-460b-a214-e92ef7babc7e>. Accessed January to April 2025

² *ibid*

³ Clackamas County. (2021). Performance Clackamas, Clackamas Strategic Plan. <https://www.clackamas.us/performance>. Accessed January 2025

Benefits of Community Engagement

Community engagement is a valuable link between leadership (e.g. Board of County Commissioners), county staff, and the community. Meaningfully engaging with community members leads to stronger trust, greater satisfaction with government performance, and more acceptance of government decisions. These community benefits also speed up processes and ensure completion of projects to meet county requirements and needs. Community engagement offers a range of benefits:

- Improves the decision-making process by considering a range of perspectives, experiences, and knowledge
- Ensure voices of underserved population members are surfaced
- Creates a shared purpose and a more connected and informed community
- Encourages greater public participation
- Reduces misconceptions and misinformation about county projects and initiatives
- Identifies and addresses existing and potential concerns
- Invites community members to influence the decision-making process.⁴

Clackamas County Guiding Principles & Core Beliefs for Community Engagement

Clackamas County uses a community engagement framework that supports staff in creating a public process that is representative of the entire community's voice and needs. See *Appendix A. Clackamas County Community Engagement Framework*. This framework is built on five guiding principles and a number of core beliefs.

⁴ Clackamas County. (2021). Performance Clackamas, Clackamas Strategic Plan. <https://www.clackamas.us/performance>. Accessed January 2025

Guiding Principles

1. Focus on the best interests of the community
2. Facilitate open, honest and meaningful dialogue, with clear milestones for providing input
3. Foster inclusive and equitable representation
4. Provide timely, accurate and accessible information
5. Be transparent with decision making

Core Beliefs

- Community stakeholders have a right to be involved in the decision-making process.
- Community stakeholders' contributions shall influence the county's decisions.
- The county recognizes the needs and interests of all participants.
- The county seeks out and facilitates engagement of those potentially affected by or interested in a decision.
- The county seeks input from community stakeholders in designing how they participate.
- The county provides information community stakeholders need to participate in a meaningful way.
- The county communicates to community stakeholders how their input impacts or affects a decision.
- The county engages stakeholders by meeting them where they are.

Spectrum of Community Engagement

The spectrum of community engagement to ownership developed by the International Association for Public Participation (IAP2) serves as the county's community engagement model.⁵ The county applies the model's community engagement best practices countywide and invests resources necessary to prioritize authentic, transparent, inclusive, and equitable engagement.⁶ In recent history, community engagement may have done a good job of informing and consulting with identity groups like homeowners and business associations.

A goal of using this Framework when developing Engagement Plans is to engage with underserved populations across the spectrum more effectively. And, in particular find opportunities to involve and collaborate with underserved populations as a way to increase their impact on decisions related to transportation.

⁵ Clackamas County. Clackamas County Community Engagement Framework. <https://dochub.clackamas.us/documents/drupal/72aacb47-a5b1-460b-a214-e92ef7babc7e>. Accessed January to April 2025

⁶ *ibid*



Figure 1. Spectrum of Community Engagement

Section 2. How to Use the Framework

Purpose of this Framework

The purpose of the framework is to provide considerations and recommendations that can be integrated into engagement processes or Engagement Plans specific to underserved communities. It goes beyond the engagement recommendations provided in the Clackamas County Community Engagement Framework to address concerns outlined in the equity analysis (Community Profile) required by OAR Community Profile. It also ensures the Transportation System Plan Update meets requirements outlined in Chapter 660-012 which outlines the rules for Transportation Planning within the State of Oregon.⁷

Terms used in the Framework

- **Underserved/priority populations.** These terms are used interchangeably throughout the framework to describe individuals and groups with one or more identities typically underserved and, therefore, deserve prioritized attention in our planning processes. OAR 660-012-0125 directs the county to prioritize engagement and actions that result in more just and equitable outcomes for all Oregonians which require intentional focus on the following priority populations:
 - Black and African American people
 - Indigenous people (including Tribes, American Indian/Alaska Native and Hawaii Native)
 - People of color (including but not limited to Hispanic, Latina/o/x, Asian, Arabic or North African, Middle Eastern, Pacific Islander, and mixed-race or mixed-ethnicity populations)
 - Refugees and immigrants, including undocumented immigrants
 - People with limited English proficiency
 - People with disabilities
 - People experiencing homelessness
 - Low-income and low-wealth community members
 - Low- and moderate-income renters and homeowners
 - Single parents
 - Lesbian, gay, bisexual, transgender, queer, intersex, asexual, or two-spirit community members (LGBTQIA+); and
 - Youth and seniors

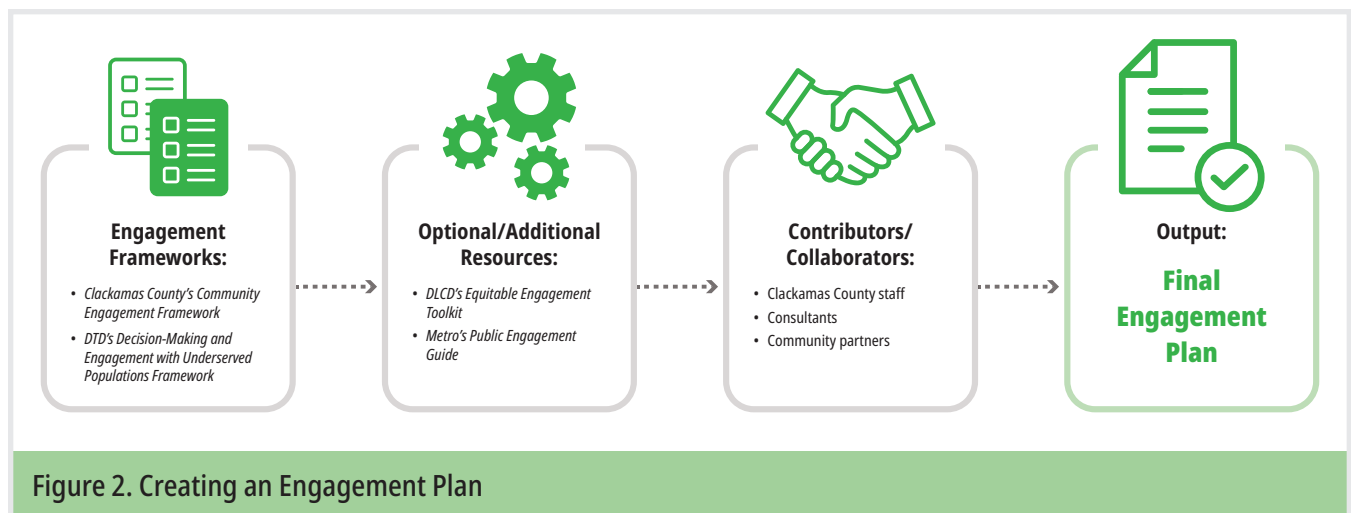
⁷ State of Oregon. (2022). Department of Land Conservation and Development Chapter 660. https://secure.sos.state.or.us/oard/displayChapterRules.action;jsessionid_OARD=KJf6SZ3puv0S-aFsDdECh4gsX6MocROP10X3DlwASTVr9qyvAjov!1304836193?selectedChapter=124. Accessed April 2025

- **Unincorporated Clackamas County:** are areas of Clackamas County that lie outside the jurisdictional boundaries of incorporated cities and are not serviced by those cities.

How to Use this Framework & Support Resources

When starting a new project, planning process or plan, staff can review this framework and the Clackamas County Community Engagement Framework to create an engagement plan or strategy for their planning process. The Framework focuses specifically on engagement considerations and recommendations for underserved populations as defined in Oregon Administrative Rule (OAR) 660-012-0125 while the Clackamas County Community Engagement Framework focuses on the community at large.

Both frameworks, other resources available through Clackamas County, Metro and the State of Oregon, and expertise from consultants and staff will feed into the creation of a final engagement plan for a project (see Figure 2).



Section 3 provides many considerations and recommendations for staff to infuse practices and strategies to engage underserved populations into their engagement processes the following three phases of community engagement: *Phase 1. Considerations and Discussions Before Drafting the Engagement Plan*; *Phase 2. Create an Engagement Strategy*; and *Phase 3. Engagement Wrap Up and Reflection*.

The appendices include additional information and templates to support implementing the framework. Additionally, the following resources provide additional insight and information that can inform engagement with underserved populations.

- **Clackamas County Community Engagement Framework**
Clackamas County Community Engagement Framework (Appendix A) is an existing resource to aid project managers in developing an engagement plan for their project. It outlines the county's guiding principles and core beliefs when designing the community engagement experience as well as information when developing an engagement plan.

- **Department of Transportation & Development (DTD) Engagement Strategy Template**
This template is a document currently available for DTD staff to use when developing their engagement plan or strategy for a transportation project or planning processes (see Template C).
- **Cultivating Belonging in Clackamas County by the Coalition of Communities of Color**
In 2024, this research justice study was commissioned by Clackamas County. The objective of the research was to demonstrate the needs, truths and desires of communities of color in the Clackamas County to support the cultivation of belonging in the county. This framework incorporates findings from the “Cultivating Belonging in Clackamas County, A Research Justice Study” in *Section 3* below.
- **Community Profile (Clackamas County)**
As required by OAR 660-012-0135, an equity analysis was completed to inform this framework. The Community Profile includes a historic assessment and a demographic analysis conducted of unincorporated county and the county as a whole. This analysis and community vetting process set the foundation for the recommendations in this framework. To better understand why concepts and recommendations are included in this framework it is recommended staff review the Community Profile in full. Appendix B offers an overview of the Community Profile.
- **Department of Land Conservation and Development (DLCD) Equitable Engagement Toolkit**
In February 2025 the Department of Land Conservation and Development (DLCD) released a toolkit for equitable engagement in Oregon. The toolkit offers techniques and strategies for local government institutions and planners doing engagement with priority populations.
- **Metro’s Public Engagement Guide**
In April 2024, Metro published a guidebook on equitable engagement. It is a flexible tool with information to enable meaningful connections and collaboration between community members, Metro staff, the Metro Council, local governments, local businesses, and nonprofit organizations. This tool is available for reference for other government institutions.

Key Issues: What we learned from the Community Profile⁸

The Community Profile is comprised of a historic assessment and a demographic analysis conducted of unincorporated county and the county as a whole. As part of the process, the Community Profile history and data was vetted by several community-based organizations and community leaders who support our priority populations. During the analysis and development of the Community Profile the following issues surfaced. Note, the following key issues are not mutually exclusive:

1. There is an overwhelming need to **build trust** between priority populations and county government to conduct effective community engagement. This will require changes to systems and culture as well as practices.
 - The severe lack of trust between priority populations and government runs generations deep. Clackamas County must begin replacing negative stories with positive stories/experiences to shift the narrative in communities.
 - Community does not generally distinguish between different departments or programs within Clackamas County. The practices of one department or program impact others. Building trust must span across departments to be truly effective.
 - Safety is foundational for underserved populations and creating safe and welcoming spaces is essential to reach and engage these audiences.
 - Transparency and accountability build trust over time. These must be incorporated into the entire engagement process, including at the conclusion of a project or through any project manager/leadership transition.
 - Hiring staff and consultants that look like, and speak the languages of, the community we are trying to build connection with creates an entry point of safety and initial trust.
2. Take time up front to **understand the context** priority populations are living in.
 - Research, ask colleagues, and explore issues of importance for priority populations at this time (major religious or cultural holidays, poverty, deportation threat, war impacting family members in other countries, influx of hate rhetoric and hate crimes, cultural norms).
 - Over-asking/taxing community partners⁹ (e.g. community-based organizations, faith-based organizations and community leaders) and community members with numerous engagement requests such as surveys, focus groups, participation at meetings, and committee commitments can lead to capacity issues and burn out. These groups and individuals are being asked to participate in multiple public engagement efforts.

⁸ Note: The Community Profile was completed to comply with DLCD Transportation Planning Rule 660-012-0135 Equity Analysis.

⁹ Community-Based Organizations (CBOs) are local, nonprofit organizations with close ties and built trust in communities that provide services to address the public health, social services, and/or health care needs of their community.

3. Relationships are essential in connecting with underserved communities and require ongoing investments outside of a specific engagement process.

- Relationships with community leaders, community partners, colleagues and organizations outside of DTD are critical to successful engagement with priority populations. Relationships allow us to gain and build trust, understand the context, host successful events, develop effective messaging and ultimately reach the priority population.
- Building a relationship requires time, flexibility, transparency, accountability, and sharing resources and decision-making opportunities with community organizations and community members.

4. Empowerment of priority populations is central to gradually resolving historic disinvestment and disparities. True community engagement is about collaborating with, and empowering, communities.

- Empowerment requires sharing of data, information, resources and decision-making ability.
- Create sustainable paths for empowerment that include financial resources to build knowledge, ability, and access to government between stand-alone projects and plans.
- Support culturally- and identity-specific groups in connecting with each other; provide opportunities to meet and get to know other residents with similar lived experiences in the county, to share resources, and, ultimately, to build a sense of connection and trust between people and organizations.¹⁰

An individual engagement plan may not be able to address all the recommendations and considerations identified through this process and framework. Some changes are out of the scope of one team or a single engagement plan. Additionally, there will be choices and trade-offs between recommendations due to constraints in resources, connections, and opportunities. The purpose of this framework is to provide staff with a variety of recommendations for improving how to engage underserved communities in our broader engagement efforts.

¹⁰ Recommendation included in the Coalition of Communities of Color. (2024). Cultivating Belonging in Clackamas County: A Research Justice Study. Portland, Oregon: Coalition of Communities of Color. *Call to Action*

Section 3. Considerations & Recommendations

Community engagement is core to the county's strategic priority to ensure safe, healthy and secure communities. This section offers recommendations on how to address the key issues identified in *Section 2*, where it outlines *key issues* for engagement plans and activities throughout the engagement process.

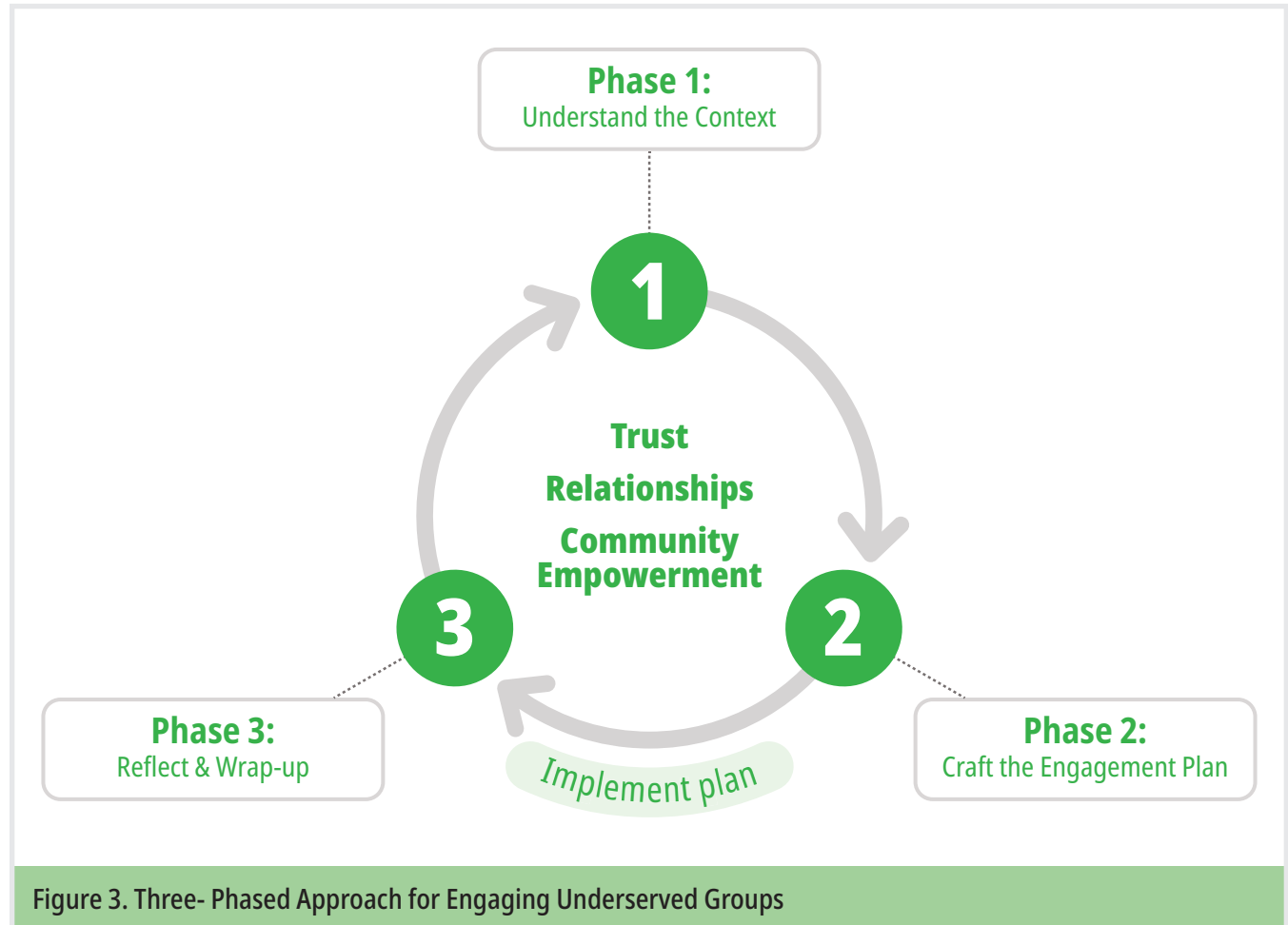


Figure 3. Three- Phased Approach for Engaging Underserved Groups

Phase 1. Considerations and Discussions Before Drafting the Engagement Plan

Step 1. Understanding Priority Populations in the Study Area

Effective community engagement begins early in the scoping and planning stage of a transportation planning process. The following recommendations focus on limiting the burden on community and showing respect and care through greater understanding, ongoing connection, compensation for time and expertise, and ensuring transparency and accountability occurs throughout the process.

Understand the Priority Populations in Your Project Area

This is a snapshot of demographics in Clackamas County and unincorporated Clackamas County.¹¹

Income: 31.3% of households in Clackamas County are cost burdened.¹²

- Rural and/or unincorporated areas have higher proportions of households living under the Federal Poverty Level (FPL)¹³ compared to the county as a whole.

Disability: 26% of households in Clackamas County report at least one person with a disability.

- Mobility disabilities are largely prevalent throughout the county
- Rural areas have a greater proportion of people who lack health insurance or have a disability.

Race/Ethnicity: 17% of Clackamas County residents identify as non-white

- The largest minority group is our Hispanic/Latino/a/e population.
- Areas with more Hispanic/Latine communities generally overlap with areas with a higher presence of individuals that speak English less than “very well”.

Languages Spoken: 3.7% of Clackamas County’s population speaks English less than “very well”

- Unincorporated Clackamas County has a great proportion of people who speak English less than “very well” compared to the entire County.
- Of the 12 languages spoken throughout Clackamas County, Spanish speakers account for the largest percentage of the county’s total population at 5.24%.

¹¹ For additional demographic information refer to the *Community Profile* which was completed in 2025 using the most current data available at that time.

¹² Cost burden is defined as paying more than 30% of household income for housing (rent or mortgage, plus utilities). Severe cost-burden is defined as paying more than 50% of household income for housing.

¹³ Low-income and low-wealth are often defined, measured, and compared using the federal poverty level (FPL), which is categorized and defined by household size. In 2024 the FPL for a family of four was \$31,200.

Recommendation: Review Existing Demographic Information Before Creating an Engagement Plan for the Project.

Review the Community Profile and consult with colleagues to understand the demographics of the study area. Discuss the following:

- ☐ What priority populations reside, work, or are located in your study area?
- ☐ Of the priority populations located in the area, who may be most important to engage in the process?
- ☐ Are there unknowns about the groups or areas of further understanding needed before crafting the engagement plan?

Tip: Use Template A to begin to list specific underserved groups located in your study area.

Step 2. Assess the Current Context for Priority Populations

Understand the Current Context

After exploring the demographics of the project area, what might be happening at the local, regional, or national level that may impact underserved communities' ability to engage on transportation within the time frame of the project? What history for the community or in that geographic area might be important to acknowledge? Exploring this will help identify safety concerns and allow the team to plan activities and communications with sensitivity and respect. It will also help build a realistic engagement plan and focus resources where they are needed most.

Recommendation: Develop Engagement Approaches That Reflect Historic and Current Conditions for the Project Area and/or Priority Populations.

With the project team, assess and reflect on potential issues related to the project area and the priority populations that will be engaged. How might engaging with these groups look different to accommodate specific circumstances? The below questions can be used to inform the engagement approaches.

- ☐ What conflicts or acts of bias or hate focused on communities occurring might have communities focused on basic safety for themselves or their family members?
- ☐ Is there historic or cultural significance where the project is taking place?
- ☐ What major religious events or holidays could impact participation could be leveraged to increase participation (e.g. Ramadan or Lunar New Year). Review *Appendix C. Tips for Honoring Multi-Faith Holidays (2025)* for culturally specific and faith-based holidays

Tip: Use Template A to begin to note context opportunities or limitations for engagement for each priority population in your study area.

Step 3. Use Existing Community Information to Inform the Project When Possible

Limit Clackamas County's Collective Burden

Many Clackamas County departments and divisions like Public and Government Affairs (PGA), Health, Housing and Human Services (H3S), and Disaster Management (DM) regularly engage communities for assessment and planning efforts. Leveraging recently completed community engagement efforts and collaborating on engagement processes reduces duplicative data extraction from communities with limited bandwidth, builds trust in government, and frees up resources to focus on collecting community data that will inform gaps.

Recommendation: *Utilize Existing Community Data and Align Engagement with Other Complementary Efforts.*

What other public engagement efforts have, or will, be conducted within a similar timeframe (one-three years)? Connect with other county staff and departments about engagement efforts planned or recently conducted with community members, partners or leaders. If your team lacks connection and contacts, talk with other project managers or PGA about connecting or building those connections over time.

- Recently completed engagement: Collect available reports, summaries, or lessons learned from recently completed engagement. Review and incorporate existing qualitative data or information into the project using thematic analysis methods. (See *Appendix D. Thematic Analysis FAQ*). Focus the community engagement plan on building upon what has already been collected or filling information gaps.

Tip: Allocate time for qualitative review and thematic analysis to be incorporated into the scope of work.

- Recently completed engagement: Department of Transportation and Development is developing, as of 2025, a database map which summarizes geolocated comments from past transportation engagement efforts. This is a great resource for reviewing past community data on transportation projects by geography and topic.
- Engagement effort(s) in process: Explore opportunities to optimize project resources, incorporate questions or information sharing into scheduled events/meetings/focus groups, and identify other strategies to leverage outreach efforts and avoid duplication.

Tip: Consider creating talking points acknowledging how the project data collection differs or builds upon what has already been collected to acknowledge that community is being asked to weigh in on a similar topic.

- Engagement effort planned for near future: Explore opportunities to leverage resources, combine information sharing, communications, data collection, and committee opportunities where possible in future engagement efforts (across departments when possible).

Tip: Be intentional to share with others what you have learned in your process.

Step 4. Invest in Partnerships

Relationships and Partnerships with Community Organizations

Working with and through trusted community partners who already have connections with priority populations and can facilitate comfort, safety, and cultural competency will increase your success in reaching these communities.

Ideally, relationships with community partners and leaders should be built and in place before the engagement process begins. If relationships are not in place, work with colleagues across county departments to leverage existing relationships and partnerships. Consider how to use the current process to build new relationships respectfully and slowly using the guidance discussed below.

Recommendation: *Take Action to Build and Maintain Relationships.*

Identify key partners and organizations to build relationships with over time, then carve out time to build those relationships in advance of the project. Opportunities include:

- ☐ Attend partners organizations' events and conferences without an agenda or ask.
- ☐ Connect over coffee or virtual meet and greets. *"Connect before content"* which means build in time to connect on a personal level before jumping into content.
- ☐ Find ways to support partner organization's goals – share resource opportunities, collaborate on shared efforts, make referrals, provide data, share relevant inspirational case studies and more.
- ☐ Learn about the specific group's values, culture, and needs.

Recommendation: *Assess Existing Relationships with Partners Serving Priority Populations Important for your Project/Plan.*

- ☐ Review existing contacts and relationships with community partners and organizations serving priority populations you hope to connect with through your engagement process.
Tip: Use Template A to begin to compile contacts and understand partnership needs.
- ☐ If there are gaps in connections to community partners serving priority populations, consider reaching out to PGA and colleagues across the county to identify additional connections with organizations serving priority populations or make a plan to build new relationships through your engagement process (note: additional time and resources will likely be needed for new partnerships).

Recommendation: *Scope the Level of Engagement desired with Key Community Partners Early in the Process.*

Review the Spectrum of Community Engagement (*Section 1, Figure 1*) and consider whether and how many community partners should be brought into the engagement work early. To move toward “involve” and “collaborate,” be thoughtful and realistic about with who and how this could be achieved.

For greater collaboration with community partners or community-based organizations consider the following in the budget and engagement scope:

- ❑ How will community partners be involved throughout the process and be provided fair compensation for their time and expertise?
 - ❑ Can an existing relationship be leveraged, or are new partnerships (or contracts) needed?
 - Potential areas of support may include communications, engagement, **co-hosting events, developing engagement opportunities, being a liaison** to their community, interpreting qualitative data collected from their community, and more.
- Tip:** If a contract or RFP process is required to bring in community partners, ensure adequate time.
- ❑ Be sure to have resources for thanking and/or acknowledgement partner contributions toward the process and outcomes. See Phase 3. Engagement Wrap Up and Reflection, for additional information.

Tip: Use Template A to note the level of desired engagement per priority population (or subset of that priority population) to begin to gain a sense of priority, resources needed, and if existing partnership are sufficient or there are gaps to fill.

Step 5. Set your Engagement Plan Up for Success Early

Allocate Time & Resources

The Spectrum of Community Engagement (*Section 1, Figure 1*) offers budget recommendations to achieve certain levels of engagement with community members and organizations and some guidance is offered below.

Additionally, developing realistic timelines with community partners affirms trust through the process. Keep in mind that community organizations are often run by volunteer staff outside their regular jobs and/or provide direct services to the communities they serve. They need ample time to communicate, plan, and mobilize staff, if the capacity exists.

Recommendation: *Identify External Resources Important to the Success of the Engagement Plan.*

Is a consultant being hired? What is their role in implementing the engagement plan, particularly in engaging priority populations? Are there opportunities to hire community-based organizations with inside knowledge and expertise in engagement and community connections with priority populations and scale back the consultant role?

- ❑ Set aside in your budget to offer stipends or payment of contracted services to community

partners to support engagement.

- ☐ Co-host support = \$750-\$1000
- ☐ Support promotion, communications, engagement, and host events = \$10,000 - \$15,000
- ☐ “Defer to” community partners to support work = > \$10,000

Note: These amounts reflect work in Public Health in 2025, they will change over time. Ask community partners what they are able and willing to do as part of the project and what resources and compensation they need to do it.

Recommendation: *Allocate Resources for Participation, Translation, Interpretation, and More*

Sufficient resources need to be allocated in the budget to pay for stipends, translation, interpretation, food, childcare and more throughout the process. Ask the following questions.

- ☐ What events, surveys, or activities will require additional funds for priority populations?
 - Costs for meals, transportation, and childcare
 - Space rentals at safe and familiar places
 - Additional advertising costs in culturally specific papers, newsletters, websites
 - Community participant incentives like gift cards, stipends, or passes to county-owned facilities (e.g. County Fair or water park) or partner organization activities.
- ☐ Allocate resources for translation of materials and interpretation at meetings. Build in time to translate materials, interpretation during meetings and meeting with interpreters before an event to go over content, questions and run of show.

Recommendation: *Build Extra Time into the Project Timeline When Working with Community*

Consider the following when developing a timeline:

- Community groups often operate on slower timelines and have less capacity for quick deadlines than institutions or for-profit companies. Also, it adds another step in your engagement process that takes additional time.
- It takes additional time to get materials translated or have groups review survey drafts before they are finalized.
- Contracting with a community partner, procurement will take additional time.

Accountability and Transparency

Accountability and transparency is essential to building trust and long-lasting relationships with community partners and underserved community members.

Recommendation: *Incorporate Previous Feedback and Lessons Learned into Current Process*

Connect with other DTD project managers, PGA, and county staff to discuss lessons learned from

past processes. How can this engagement process build upon or replicate successes and avoid repeating mistakes?

- Did the project have success reaching priority populations? Why, why not? What could have been done differently?
- Which community partners were involved? How did they support the process? What additional support could have improved engagement?

Note: Ideally, DTD will maintain a shared folder or location to collect and store lessons learned over time. This will retain valuable institution knowledge and make information available for any project manager at any time.

Recommendation: *Document Decisions and Strive for Improvement not Perfection. Use Template C. Phase 3 Notes: Wrap Up and Reflection.*

Because there are limitations and trade-offs, it's important to be realistic and transparent about the choices and discuss and document why certain decisions were made for the engagement plan. Be honest with staff, community partners, and the community about why the decisions were made.

Additionally, documenting decisions helps DTD understand if larger changes are needed to address limitations. For example, if engagement efforts engage priority population A, B, and C because staff don't have relationships with priority population D, it gives the department greater justification that investment in partnerships with population D is worthwhile and will benefit many projects.

Step 6. Plan for Evaluation Early

Evaluating what worked well and where you can improve creates a culture of learning and helps staff improve with each engagement effort. Being accountable to complete what is promised and transparent about what worked well and what could be improved upon, earns trust with partners and community members.

Recommendation: *Measure, Collect and Compile Data to Track Performance*

Discuss the performance measures listed in *Section 4, Equitable Engagement Performance Measures*, to ensure this information is collected throughout the process. Define roles and methods for collecting and compiling data with the least amount of burden on participants (see Recommendation: Collect Data That is Most Useful and Appropriate under Step 10 for creative ways to collect demographics from community members at events). Consider:

- Incorporating an evaluation report to measure any process or outcome measures important to the project.
- If a full-scale evaluation is not budgeted or scoped, consider tracking and counting things and people: trainings, events, number of participants, partner interactions, meeting outcomes, media coverage, or spot visits.

Phase 2. Create an Engagement Plan

Now that a number of considerations related to context, timelines, budgets, existing relationships, transparency, and evaluation have been discussed, it's time to begin to populate the engagement plan template (Template B).

Step 7. Communications and Messaging with Priority Populations

- ☐ Identify level of community interest in the project. Have community members voiced interest, concerns, or opposition to the project?
- ☐ Consider alternative communication channels, like radio, podcasts, posting on community partners' websites to get the message out.

Recommendation: *Communicate Clearly and Thoughtfully Throughout the Process*

Get clear on key communication and engagement needs and develop clear messages so all team members and consultants communicate consistently and transparently to priority audiences throughout the process.

Note: Create messages in plain language. Some may need to be tweaked for priority population audiences, and messages may need to be updated mid process – this is a starting place for transparency.

- ☐ What will this project do?
- ☐ What do we (Clackamas County) have in mind for this new project or update to previous effort?
- ☐ Planning for those specific actions will help meet broader county goals.
- ☐ What won't this project do?
- ☐ What are likely community concerns?
- ☐ What potential process concerns may affect this project?
- ☐ How will public feedback affect the outcomes? How will the public know? How will priority populations' perspectives be incorporate

Step 8. Selecting Partners for Engagement with Priority Populations

As discussed in Phase 1, communicating and engaging with priority populations typically requires a trusted messenger. One option is to reach out to collaboration with community-based organizations, faith-based organizations and/or community leaders. Consider the following partners and how to connect with those entities when building out an engagement plan:

- ☐ **Non-profit organizations:** What community-based organizations exist in Clackamas

County that may be able to better reach your priority populations? Do those CBOs have capacity to support the work and do they have an understanding of the project? Who in your team or beyond has existing relationships with staff from community-based organizations that serve priority populations? Is this nonprofit being consistently asked to participate? Are there others that might have more capacity to participate?

- ❑ **Tribes and indigenous community members:** Tribal community members and tribal governments require slightly different approaches. For tribal governments, PGA office should be involved in developing the outreach strategy and it's usually best for them to do outreach to tribes. For indigenous communities, working with the tribe is one way, and working with community organizations and community leaders is another way to connect.
- ❑ **Faith-based leaders and religious organizations:** These organizations can be a great way to connect with culturally specific groups. Keep inclusive and welcoming to members of that faith, they can be unwelcoming to others, and the situation will be nuanced.
- ❑ **Schools and parent teacher associations:** High schools may have youth clubs or civic classes that might offer opportunity for partnership.
- ❑ **Minority owned business:** Business may also provide a pathway to connect with specific communities, depending on the types of businesses. For example, culturally specific markets that are typically well known in the priority community may offer opportunities to share information at the location or may have space to enjoy light meals.

Recommendation: Identify Entities for Partnerships

Refer to notes taken in Step 4 or noted in Template A and start to list community partners to connect with and colleagues that may have relationships with those groups. Consider working with PGA to reach across county departments to see if other staff or programs are willing and able to make connections to fill any gaps.

Recommendation: Share Resources and Allow Community Partners to Lead When it Comes to Engaging Their Communities.

When working with community partners we need to:

- Defer to and incorporate their recommendations on how to work with their communities.
- Offer sufficient resources to support their engagement work.
- Work within their timeline and pace.
- Integrate into in the decision-making process.
- It's OK to explicitly ask community partners what they need to be successful.

Step 9. Identifying Tools and Tactics for Engagement with Priority Populations

General Guidance

Diversifying the use of engagement and communications techniques increases the ability to meet engagement goals and communication needs.

Recommendation: *Utilize New Tools and Techniques to Creatively Engage Priority Populations*

This framework and support resources listed in *Section 2* such as the Clackamas County Community Engagement Framework (Appendix A), Metro’s Public Engagement Guide, and DLCD’s Equitable Engagement Toolkit support creative ways to engage priority populations. Ideal practices for engagement that also work well for engaging with priority populations include the following:

- ❑ Compensate participants/incentivize participation.
- ❑ Be aware of which audiences do well with technology and which does not.
 - Include virtual and in-person meeting/activity options. Hybrid meetings can be the best option but requires knowledge and management of technology and a strong facilitator.
 - Offer print and digital media surveys and communications
- ❑ When considering whether to conduct a meeting in-person, hybrid, or virtually consider the following.
 - In-person meetings are recommended for a first meeting in a series, trainings, orientations, or meetings that involve a major decision or gaining consensus. This allows participants to connect with each other, engage with the content, and work to condenses more effectively.
 - Hybrid meetings are most inclusive but require technology and a skilled facilitator to include people participating virtually.
 - Virtual meetings can over greater accessibility, language options, and use of interactive elements like polls or breakout groups to enhance engagement.
- ❑ Be adaptive according to the communications, cultural, language or accessibility needs of the audiences.
- ❑ Go to where people are already, like events, festivals, fair, shopping centers, community gathering places, post offices, large employers, schools, and more.
 - Passive tabling doesn’t usually bring folks in. Include some kind of activity or connection point. For example, the Traffic Safety team includes an interactive driving activity with their tabling at the County Fair as a way to reach new constituents, particularly people in South County and unaffiliated persons.
- ❑ Include written translation and a qualified simultaneous interpreter if the audience

identified has limited English proficiency.

- ❑ Partner with community organizations and trusted groups when possible. They can be great resources for the following activities:
 - Share information and promote activities through websites, email lists, forums, etc.
 - Co-host events or provide space at their events/activities
 - Recruit committee members
- ❑ Be creative¹⁴
 - Podcast interviews or interactive play-based workshops over traditional meetings
 - Incorporate popular education practices into any educational aspects of Engagement.
- ❑ When developing messaging:¹⁵
 - Craft messages to engage the audience
 - Use plain language
 - Appeal to people's self-interest, and if you don't know what that is, do additional research and listening
 - Tailor your message for each community group in the appropriate language and cultural context

Recommendation: *Connect with PGA and colleagues to Review Community-Specific Considerations as you identify engagement tools and techniques.*

There may be population-specific considerations that can add value to existing engagement tools listed in the Clackamas County Community Engagement Framework. Connect with PGA staff or colleagues in H3S who serve those communities to fine-tune engagement techniques by priority population as you populate Template B. Phase 2: Engagement Strategy Template.

Include in Decision Making Process

Identifying ways to include priority populations in decision-making processes creates communities where everyone has a voice in shaping a shared future and everyone has an opportunity to thrive.

Recommendation: *Identify or create specific opportunities for involvement in decision-making throughout the process.*

- ❑ Who are key priority populations you'd like to hear from and who should have a role in shaping the outcome?

¹⁴ Metro. Public Engagement Guide.(2024). <https://www.oregonmetro.gov/sites/default/files/2024/08/20/metro-public-engagement-guide-a11y-remediated-20240724.pdf>. Accessed December 2024

¹⁵ City of Hillsboro. (2022). Community Engagement Framework.

Advisory Boards and Committees

Steering or advisory committees or boards are common in transportation processes and can be a great way to build capacity, gain diverse insights, and share decision-making power. Staff often want to include, and even prioritize, participation from priority populations on these boards and committees.

Recommendation: *Priority Group Representation on Committees Requires Additional Effort to be Successful*

An ideal makeup of a committee or board includes diverse perspectives and insight. That said, participants from priority populations are not always able to participate fully or have a positive experience on committees due to existing dynamics and other limiting factors. Additionally, reflect back on *Phase 1, Considerations and Discussions Before Drafting the Engagement Plan*. Be aware of the number of committees the county is facilitating within a certain timeframe to understand cumulative commitment from community leaders and participants. To set your committee up for success, review and incorporate the following considerations:

- ❑ Promote committee opportunity with reasons why it adds value for the participant – e.g. working with community leaders, civic leadership experience, resume builder, having the opportunity to make decisions, networking, etc.
- ❑ Proactively work with trusted contacts to personally invite members from underserved communities. This is where sustained relationships and connections with community partners can benefit a process.
- ❑ Reserve multiple seats for participants from priority populations so they can more comfortably and confidently engage in the conversation. Consider for example, always holding two youth seats on the committee.
- ❑ Provide orientations for all participants so everyone is starting at the same place and can participate in a meaningful way. Orientations also help establish a foundation for working together and creating group agreements (shared expectations or code of conduct). Additionally, in many cultures, getting to know people on a personal level comes before business.
- ❑ In many cultures, food is a way to build relationships and bring people together. Offer culturally diverse meals at in-person meetings.
- ❑ Offer stipends for participants' time serving on a committee.
- ❑ Offer participants letters of recommendation written by department heads.

Community members from identified priority populations are the experts of their own lives and experiences. As stated in the Coalition of Communities of Color, *Cultivating Belonging in Clackamas County* report “...when properly organized, supported, and relied upon for decision-making, communities of color will always find the right strategies to improve their realities.”¹⁶

¹⁶ Coalition of Communities of Color. (2024). *Cultivating Belonging in Clackamas County: A Research Justice Study*. Portland, Oregon: Coalition of Communities of Color. pg. 157

Recommendation: Empower New Voices to Build Capacity and Leadership Opportunities

If staff really want to hear honest, unfiltered feedback and advise, hosting leadership or advisory committees with a capacity building components provides staff with unique insight into the issues and offers priority populations influence on the outcomes. This is a great way to empower priority populations. These can be youth-focused, adult-focused or a mix. (Tip: separating youth and adult groups empower youth and adults to fully express themselves, unfiltered)

These capacity building committees require more time and resources to support compared to traditional committees and offer unique benefits. Many of the recommendations listed in section *Advisory Boards and Committees* also apply to committees focused on capacity building for historically underserved communities.

Community Events

The Coalition of Communities of Color report, “2024 Cultivating Belonging in Clackamas County”, shares insight on using events as a method of engagement and connection for underserved community groups. See chapter 6 of their report for additional details.

Recommendation: Incorporate Community Led Events into Engagement Efforts as a Way to Meet Priority Populations Where They Are.

When possible, collaborate with community-based organizations (CBO), faith-based groups and other trusted entities to plan and host engagement events, attend already scheduled events and activities (ask the CBO the best way to show up), and collaborate with CBOs to share information about a project.

Recommendation: Incorporate Mini Engagement Events that meet Community in Places they Visit, Shop, or Gather.

Clackamas County has learned from a number of recent engagement processes that meeting community in places they recreate, shop, or visit is an effective way to reach priority populations who don’t normally go to open houses of project-specific events. Examples include pop-ups at farmers markets, culturally specific grocers, shops, cafes, community events, and more. It could be places where people get their information like post offices in rural areas, or communal spaces in housing complexes or mobile home communities. Working with community partners or other colleagues in the county who are familiar with these communities can be a great way to identify locations for pop-up or other non-traditional events.

Step 10. Tips for Building Relationships and Trust Throughout the Process

Once a community engagement plan has been developed, the project-specific engagement and information sharing begins! The following recommendations ensure that trust is built and

sustained throughout the process.

Recommendation: *Invite Decision-makers to Events and Activities Where Priority Populations are Present.*

Create opportunities for priority populations to meet and interact with their decision-makers of the project. This helps to build understanding and connection between residents and their leadership and for leadership to hear directly from community. This can help build trust over time.

Recommendation: *Maintain County Staff Leads to Cultivate Lasting Relationships*

Be intentional about using county staff as the face of your project or as an engagement lead with community partners. This may enhance your team's ability to build relationships with partners over time and also lets organizations know who they can follow up with if needed.¹⁷

It is ideal to have individuals who engage with priority populations who look like, share identities, and speak the languages of participating communities. We heard from communities that this offers an initial signal of safety and trust. If that is not possible, staff who have connections to communities and have built that trust also create a sense of safety and trust.

Transparency and accountability are the primary ways individual staff help Clackamas County build trust with community partners, leaders and community members within our priority populations. The following actions foster transparency and accountability:

- Be prepared with accurate information
- Frequently provide and update information
- Empathize with feelings and fears
- Admit any complications, risks, or uncertainties
- Acknowledge power dynamics and inconveniences placed on the public
- Take action when you can
- Invite decision-makers to community events and community to commission meetings where decisions will be made

Collecting Personal Information from Priority Populations at Events

It's important to collect contact information to keep individuals informed throughout the process. Additionally, demographic and geographic information helps inform the project and performance metrics. Collecting personal information from priority populations requires additional care and consideration.

¹⁷ Coalition of Communities of Color. 2024. Cultivating Belonging in Clackamas County: A Research Justice Study. Portland, Oregon: Coalition of Communities of Color. Pg. 150

Recommendation: Collect Personal Information with the Utmost Care

Train staff and consultants in trauma-informed practices¹⁸ and understand how collecting personal information from priority populations can unintentionally cause harm.

Recommendation: Request Preferences for Ongoing Participation and Involvement

When possible, ask if and how individuals would like to be kept informed (name, email, social media). Invite community members to public meetings where decisions will be made.

Recommendation: Collect Data That is Most Useful and Appropriate.

Work with your team to understand what data you actually need (think about your performance measures) and what the pros and cons of collecting that may come up for priority populations. Brainstorm with your project team creative alternatives for collecting demographic, geographic, and other voluntary anonymous event data that doesn't involve surveys or forms. Tip: also discuss best options with partner organizations. Discuss how some of the options below could be used at your events/activities.

- **Free write/short answer on large poster boards** – e.g. listing prominent identities participants have (e.g. hearing loss, single parent, parent, queer)
- **Bean jars**- Use beans and jars to opt into race/ethnicity, disability status, or gender questions. Also questions on satisfaction as participants leave the room.
- **Mapping** - Use stickers on a map for locations
- **Interactive posters** - Use posters or large paper board to ask about how folks identify, so it's documented but anonymous. This has been used to tease out specific disabilities and overlapping marginalized identities.
- **Dot voting and sticky notes**

Phase 3. Engagement Wrap Up and Reflection

This final phase emphasizes that actions taken at the conclusion of a process are just as important as actions taken in the beginning. Recommendations provided below will demonstrate respect for community members who have invested time and energy in the planning process, accountability to priority populations who have shared their expertise, stories, and data and is an opportunity to build trust for the next process.

¹⁸ Trauma-informed approach. Staff who are trauma aware realize the widespread impact of trauma on community members they may be interacting with and recognize the signs and symptoms of trauma in community, families, staff and others. A trauma-informed approach recognizes the impact of trauma on individuals and tailors interactions to their complex needs. By understanding underlying or intersecting issues, we can meet the needs of impacted parties while collecting information for our projects. Community interactions need to be communicated in a way that promotes safety, empowerment and understanding for those who have disproportionately and predictably experience trauma.

Step 11. Evaluate and Make Decision

The conclusion of a process typically involves the evaluation and sharing of community data collected from the public throughout the process. Data is included in reports and shared with decision-makers. Some points of consideration for staff during this phase:

- Evaluate whether engagement goals and objectives were met and if further engagement is needed – with regard to your priority populations.
- Consider including communities in the interpretation, analysis and reporting of their data. This is an emerging best practice that may require some brainstorming, resources, and support to accomplish, however it offers great benefit in building lasting relationships and trust with community partners.
- Weigh input from community groups from the most impacted communities with the greatest influence on recommendations and resource allocation.
- If you have partnered with community organizations or community members, consider inviting them to present findings to decision-makers.

Step 12. Report Back to Community Partners and Priority Populations

Reporting back to community members is an integral part of the process and should not be overlooked. We know that community members do not engage because they believe their voices will not be heard or taken into consideration in the decision-making process. Let community members know they were heard.

Recommendation: *Share Updates with Participants and Celebrate Successes.*

Identify the best ways to share back with community partners and community members. Here are some suggested ways to conclude a transportation planning process:

- Share information using the same tools used to inform and engage is the first step but make an intentional effort to reach project participants in their preferred communication method. If they provided their email address in the engagement process, send them an email with the results of the engagement or direct them to where they can find the results.
- Create “You Said, We Did (or Didn’t) reports. Use concise, accessible formats- like infographics or short videos to summarize engagement results and follow-up actions. Include rationale when input is not implemented.
- Host a celebration! Celebrations can be in person or virtual to express gratitude and staff affirmations. It can go a long way with CBOs feeling appreciated for collaborating with the county.
- Send thank you cards to community partners, signed by the project team, to express gratitude and staff affirmations. Personal notes from the project manager or engagement lead help to strengthen community ties.

Step 13. Reflect and Document Lessons Learned

Information and contacts collected through one engagement process can help DTD colleagues in the next transportation planning process.

Recommendation: *Capture and Organize Feedback and Data for Future Efficiency and Effectiveness.*

Capture participant contacts in a database and organize them by stakeholder group. Make sure to enter relevant notes about the person's expertise or contributions so other staff can benefit from engaging these participants.

Recommendation: *Document Information to Build Capacity Over Time.*

Debrief on the engagement strategies/methods used for the project, lessons learned and what could be done differently in the future. Document your notes and save them in a shared location for future access. Make this a regular part of your process and practice to build institutional knowledge and capacity over time.

Consider the following reflective questions:

- What worked well?
- What didn't work?
- What could've been done differently?
- Did anything come up that wasn't expected?
- Were resources allocations appropriate?
- Where were our pain points?

Use one of the following tools to reflect:

- Plus/Delta chart¹⁹
- Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

¹⁹ Plus/Delta assessment and feedback tool is a quick and effective way for both individuals and groups to start identifying things to improve. This brainstorm-type format creates a comfortable atmosphere for an open and honest exchange of feedback. divide the sheet using a "T" shape. The right side of the vertical line is for things that should be continued or the positives, and the left side of the vertical line is for things that need to be changed or the negatives.

Step 14. Compile and Assess the Priority Population Engagement-Specific Performance Measures

Recommendation: *Compile and Assess the Performance Measures listed in Section 4.*

Many of the quantitative measures should be collected throughout the project period. Both measures help the team understand how effective the engagement effort was in addressing the key issues discussed in *Section 2. How to Use the Framework* and where additional improvement can be made in future efforts.

Section 4. Performance Measures

Performance measures for assessing key community outcomes and the effectiveness of this Framework for Engagement and Decision-Making with Underserved Populations will be tied back to the key findings shared in *Section 2*. This is because all recommendations and guidance provided in *Section 3* are intended to address those key findings discovered in our process.

Additionally, the performance measures listed below include both quantitative measures and qualitative assessment that can be used to help understand not just the quantity of who is engaged, but also the quality of our engagement. These performance measures are new, therefore, most measures will help set a baseline for tracking accountability and progress over time. They may also be modified over time for effectiveness and feasibility. Lastly, these measures are part of the total measures used to determine the effectiveness of outreach for a project and, more specifically, the Transportation System Plan Update.

Key Issues	Alignment with Clackamas County Core Belief	Performance Measures
Need to build trust between priority populations and county government to conduct effective community engagement.	<p>Community stakeholders' contributions shall influence the county's decisions.</p> <p>The county communicates to community stakeholders how their input impacts or affects a decision.</p> <p>The county engages stakeholders by meeting them where they are.</p>	<p>Quantitative: Demographics of those who participated in engagement activities/events equivalent to county demographics listed in the Community Profile (for those who choose to report). <i>(Tool: demographic collection)</i></p> <p>Quantitative: Participants of advisory and decision-making bodies is equivalent to county demographics. <i>(Tool: committee demographic survey)</i></p> <p>Qualitative: Majority of participants feel their concerns and feedback will be taken seriously by DTD. <i>(Tool: Bean Jars/quick survey as participant is leaving event with scale 1-3 for the following question(s) "How likely do you feel the County will incorporate your concerns and ideas into the project" or "How likely to do feel the County will take your feedback seriously?" or "How was your experience")</i></p> <p>Quantitative: What % of public activities/events where non- English speakers may be present offered language interpretation. <i>(Tool: event tracker)</i></p> <p>Quantitative: What % of community partners who received resources for engagement attend the final adoption of the TSP and/or offered testimony in support of final TSP. <i>(Method: count attendees and submission of testimony)</i></p>

Key Issues	Alignment with Clackamas County Core Belief	Performance Measures
Take time up front to understand the context of your priority populations.	<p>The county recognizes the needs and interests of all participants.</p> <p>The county seeks out and facilitates engagement of those potentially affected by or interested in a decision.</p> <p>The county engages stakeholders by meeting them where they are.</p>	<p>Qualitative: What actions or special consideration did you take to be responsive to the community context for this project. <i>(Tool: Reflective Questionnaire)</i></p> <p>Quantitative: 20% of total events/activities were non-traditional* engagement opportunities that physically met priority populations where they were at. <i>(Tool: Track throughout process)</i></p> <p>*non-traditional means any event that was not a government-led meeting or open house (virtual or in-person) that connected project staff and community members. I.e. CBO- hosted, fairs, faith-based locations, sharing a meal with community in their space, schools, etc.</p> <p>Qualitative: Did the project pivot to address a challenge or issue that came up throughout the process. <i>(Tool: Reflective Questionnaire)</i></p> <p>Quantitative: Response rate from community partners Clackamas County staff have relationships with. <i>(Tool: Track through process)</i></p>
Relationships are essential in connecting with underserved communities.	<p>The county seeks input from community stakeholders in designing how they participate.</p> <p>The county provides information community stakeholders need to participate in a meaningful way.</p> <p>The county engages stakeholders by meeting them where they are.</p>	<p>Quantitative: Number of new-to-government community leaders and/or community partners serving priority populations who supported engagement (information sharing, co-hosting event, offering space at existing event, other). <i>(Method: Define & track through process)</i></p> <p>Quantitative: % of 12 priority populations reached through support from a community leader and/or community partner. <i>(Method: Define & track through process)</i></p>
Empowerment of priority populations is central to gradually resolving historic disinvestment and disparities.	<p>Community stakeholders have a right to be involved in the decision-making process.</p> <p>Community stakeholders' contributions shall influence the county's decisions.</p>	<p>Quantitative: What % of engagement resources were provided for non-traditional events vs. traditional activities. <i>(Method: Define & track through budget categories)</i></p> <p>Quantitative: What % of engagement resources went to community/community-based organization contracts or stipends vs consultant vs county staff time. <i>(Method: Define & track through budget categories)</i></p> <p>Qualitative: What opportunities were created for priority populations to influence the outcome of the project in addition to opportunities that were available to the general public. <i>(Tool: Reflective Questionnaire)</i></p>
Process Measures: Overall effectiveness in implementing this Framework		<p>Staff Use: What % of project staff reviewed and applied this framework (depending on their role). <i>(Tool: Staff Survey)</i></p> <p>Knowledge: What % of staff who used this framework indicated they learned something new about engaging priority partners and populations. <i>(Tool: Staff Survey)</i></p> <p>Behavior Change: What % of staff who used this framework indicated they changed their behavior or strategy related to engagement based on information they learned in the framework. <i>(Tool: Staff Survey)</i></p> <p>Quality Improvement: What tools or resources would help staff implement recommendations in the framework in the future. <i>(Tool: Staff Survey)</i></p>

Section 5. Appendices & Templates

The following appendices provide additional information for users of this framework. Templates offer optional tools for teams and project managers to populate and take notes as they work through the framework.

- Appendix A. Clackamas County Community Engagement Framework 32
- Appendix B. Community Profile Overview..... 46
- Appendix C. Tips for Honoring Multi-Faith Holidays (2025) 49
- Appendix D. Thematic Analysis FAQ 54
- Template A. Phase 1 Notes: Initial Considerations & Discussion..... 68
- Template B. Phase 2: Engagement Plan Template 71
- Template C. Phase 3 Notes: Wrap-up & Reflection 80

Appendix A.

Clackamas County Community Engagement Framework



Clackamas County **Community Engagement Framework**



Introduction

Community engagement is the cornerstone of a successful public process. It builds lasting relationships, trust, and transparency, and achieves deep understanding of the lived experiences of those who live and work in the community we serve. Successful community engagement involves people in the decisions that affect them and about what matters to them most. It enables better outcomes for both the community and the county by allowing those involved to identify concerns, risks, opportunities, options and solutions through more informed and mutually beneficial decision making.

Community engagement is core to the county's strategic priority to ensure safe, healthy, and secure communities. The county's ability to successfully fulfill this priority will require ongoing community involvement and engagement in any current and future efforts.

Vision Statement

The county supports effective and genuine community engagement by ensuring an inclusive and equitable process so that every voice is heard and decisions reached result in an improved lived experience for all residents of the county.

Guiding Principles

Clackamas County can achieve its vision by adopting a cohesive and robust community engagement framework that ensures the public process is representative of the community's voice and needs. The framework is built on five guiding principles:

1. Focus on the best interests of the community
2. Facilitate open, honest, and meaningful dialog, with clear milestones for providing input
3. Foster inclusive and equitable representation
4. Provide timely, accurate, and accessible information
5. Be transparent with decision making

These principles will be embedded into our normal operating procedures as we seek public input at the onset of any planning or decision-making needs that arise within the county.

Core Beliefs

As we aspire toward universal goals that bring better outcomes for the communities we serve, we recognize the strategies we develop may require targeted efforts and resources that are responsive to structures, culture, inequities, and lived experiences with whom we engage. While our strategies may vary, our core beliefs remain the same:

- Community stakeholders have a right to be involved in the decision-making process.

- Community stakeholders' contributions shall influence the county's decisions.
- The county recognizes the needs and interests of all participants.
- The county seeks out and facilitates engagement of those potentially affected by or interested in a decision.
- The county seeks input from community stakeholders in designing how they participate.
- The county provides information community stakeholders need to participate in a meaningful way.
- The county communicates to community stakeholders how their input impacts or affects a decision.
- The county engages stakeholders by meeting them where they are.

Community Stakeholders

Clackamas County recognizes the value of community engagement as an essential part of strategy development, project planning, and decision making to deliver better outcomes for the community and the county. The county also recognizes we have many stakeholders with whom we work, partner, and collaborate. They are the people who live, work, and play in the county. These community stakeholders may have different needs and expectations and the county's engagement strategy will reflect this.

1. Advisory boards and commissions (ABCs) are county-organized boards of community members appointed by the Board of County Commissioners (BCC) to provide insight on specific county programs. The board members offer their lived experience and sometimes professional experience as their expertise to help guide the BCC and staff to ensure programs meet the community needs and reflect community values.
2. Community planning organizations (CPOs) are community groups that help ensure community engagement in the county's land-use process. CPOs are one of the county's methods to achieve Oregon State Planning Goal 1. CPOs are supported by the county, but are not agents of the county to ensure they can legally oppose land-use decisions. CPOs serve as a regular meeting body to offer a place for community dialogue about land use and provide their feedback to the county.
3. Hamlets and villages are community groups in unincorporated county regions that serve to connect their communities to county government. As agents of the county, hamlets are extensions of county leadership in the community. Hamlet board members serve in a unique position to share key information with their communities and to share community perspective with the Board of County Commissioners and county staff.
4. Community-based organizations are the bridge to reach the communities we serve. They are key stakeholders in the community with established relationships and are trusted by the community. Community-based organizations are nonprofit groups organized and operated by community members to support community needs.
5. Youth play an important role in strengthening programs, encouraging innovation, and ensuring

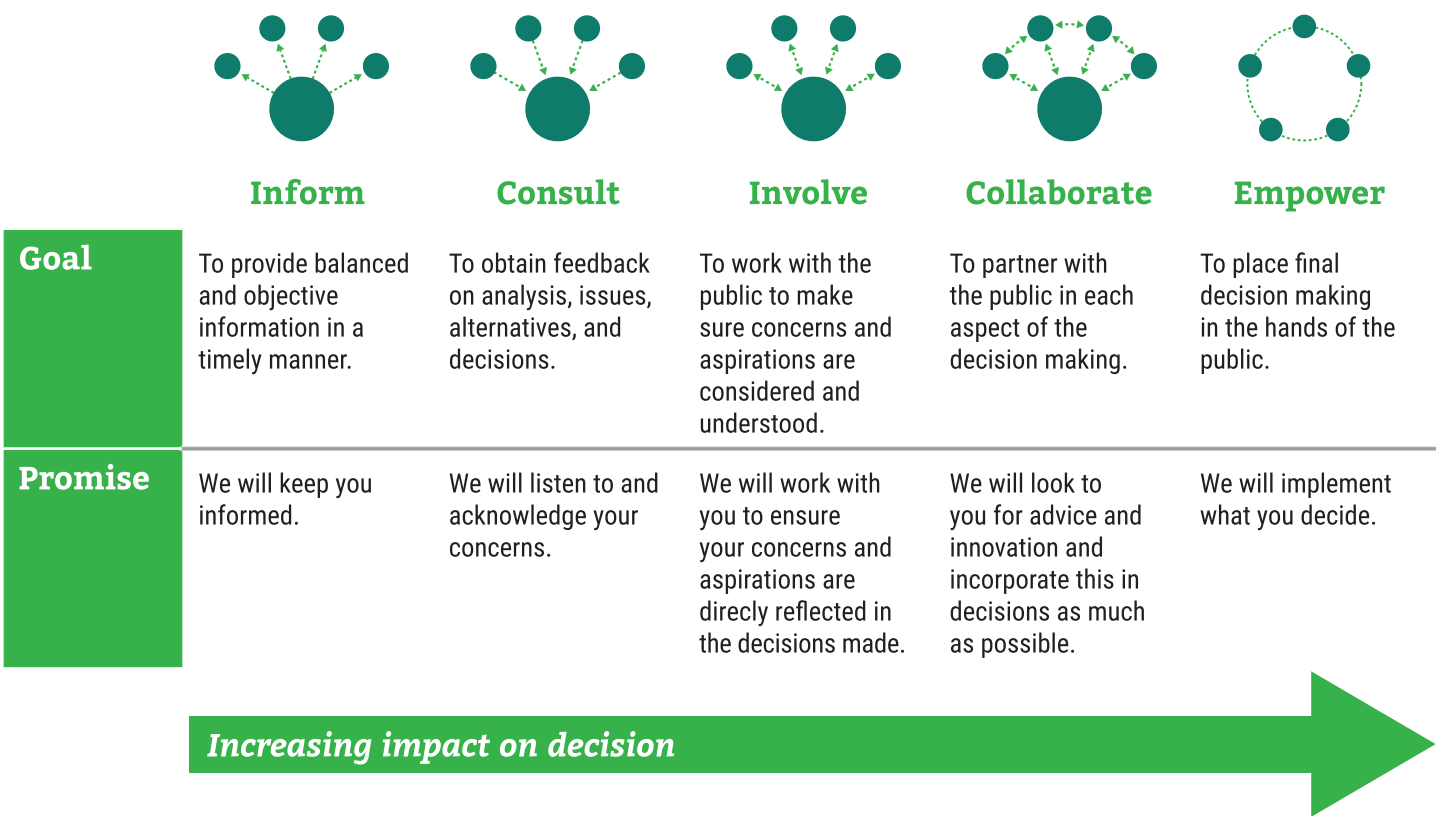
longevity and sustained outcomes. They need to be engaged as fully active participants who will inform county initiatives and help build a future community of educated, engaged, and community-minded leaders.

- Communities of interest are groups of people who share a particular experience, interest, or characteristic, such as communities of color, culturally specific organizations, grass-roots groups focused on diversity and inclusion, LGBTQIA+, faith groups, older people, people with disability, migrant groups, cultural and ethnic groups, and others. Clackamas County is diverse yet this diversity is often missing in our public process. We recognize communities of interest have unique needs and are not homogenous groups, as each group can hold multiple intersections of identity calling for nuanced solutions. The county must continue to explore and invest in culturally sensitive and informed outreach to build relationships with the diverse communities that call Clackamas County home.

Community Engagement Model

The public engagement spectrum developed by The International Association for Public Participation (IAP2) will serve as the county’s community engagement model. The county will apply the model’s community engagement best practices countywide and invest resources necessary to prioritize authentic, transparent, inclusive, and equitable engagement.

Depending on the goals of the project and level of engagement necessary, the community stakeholders will have clear expectations for how the engagement process will proceed, how they will be engaged, what they will have influence over, and how their input will impact outcomes.



Community Engagement Plans

Clackamas County's community engagement plans will embody the vision, principles, and strategies outlined above, and will be tailored to meet the needs of each community stakeholder group. At a minimum, each engagement plan will include the following:

- The purpose and scope of engagement.
- The desired objectives the engagement process will achieve.
- Stakeholder and issues analysis, including a context analysis to understand how local, regional, state, and national issues may affect the engagement process.
- A recruitment strategy that ensures inclusive representation and diversity of views.
- Engagement phases including timelines and schedules, and the level of engagement required or needed from community stakeholders to achieve engagement objectives.
- Clearly defined engagement methods or tools to inform community members, gain input, feedback, or collaboration to achieve engagement objectives.
- A process identifying how community input will be collected and how it will be used to inform decisions.
- A communication plan to raise awareness or understanding about the planning or development phases, how feedback will be provided to the community about the engagement process, what has been heard, and how the feedback will be considered in the planning and development stages.
- A list of resources needed (e.g., financial, time, human) to deliver the defined engagement methods.
- Evaluation measures to evaluate the success of the engagement.

Community Engagement Tools

Clackamas County will consider and implement a myriad of community engagement tools that are most appropriate for varying levels of engagement to deliver a successful community engagement process and achieve the engagement objectives desired. Our biggest challenge remains reaching residents and communities with limited English proficiency—one that requires adequate resources.

While the county will continue to use traditional tools, such as print materials, advertisement, and in-person engagement, we will also expand our engagement strategies to leverage the evolution of digital tools. As digital communication continues to change how people access information and communicate with government on important issues, the county will continue to explore and implement a wide range of online tools, forums, workshops, surveys, and polling.

Not all residents have time to be active in their community. With 97% broadband coverage in Clackamas County and 94% of households with computers, online and digital engagement offers a level of accessibility not available in the past. Along with accessibility, online platforms are portable, interactive, and provide real-time information. Key benefits include:

- Providing access to a more diverse group of community stakeholders and bringing more people into the conversations that affect their community: busy people, working parents, younger people, senior citizens, shift workers and people with mobility, vision or hearing impairment.
- Providing a secure space for people to learn and test assumptions, positions, and options.
- Offering cost-effective and efficient engagement systems.
- Improving transparency and responsiveness.
- Supporting community ownership at all levels of the engagement spectrum.

A list of engagement tools is available as Appendix A at the end of the document.

Conclusion

A well-defined and structured community engagement framework is an important first step toward building deep and lasting relationships with the communities we serve. The proposed plan will help Clackamas County build upon its existing efforts while pivoting toward a more forward-looking, inclusive, and meaningful strategy. This strategy is defined through core engagement principles and a well-established engagement model developed by the International Association for Public Participation.

The framework not only guides the county's efforts in community engagement, but also provides a roadmap as we seek to build authentic and ongoing relationships with community stakeholders. Successful implementation will rest on our commitment to inclusive engagement and ability to adapt to new methods of engagement as emerging technology and tools become available. Our success will depend on the priority we place on community engagement and ensuring appropriate resources are available to help us reach our fullest potential.

Appendix A. Engagement Tools

The table below lists many traditional and emerging tools to consider when implementing a community engagement initiative.

Tool	Description	Level of Participation <i>Inform-Consult-Involve- Collaborate-Empower</i>	Benefits	Considerations
Print materials	Brochures, newsletters, fact sheets, articles in newsletters, or rates notices.	Inform	<ul style="list-style-type: none"> • Can create awareness and interest within the community. • Can be tailored to specific groups and interests. 	<ul style="list-style-type: none"> • Expensive to produce. • Hard to target or monitor effectiveness. • Can miss minority groups. • Timing can be a constraint.
Advertisements	Print, TV, radio, digital, media releases.	Inform	<ul style="list-style-type: none"> • Fast, efficient, and wide reaching. • Opportunity to position projects positively with key messages. 	<ul style="list-style-type: none"> • Expensive • Hard to target or monitor effectiveness. • Can miss minority groups.
Websites	Provide accessible, clear, and appropriate information cost effectively. Can also be used for two-way information exchange.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Can provide targeted information about projects cost effectively. • Can allow community members to ask questions and receive answers that are accessible to all. • Can provide links to online surveys. 	<ul style="list-style-type: none"> • Expensive • Hard to target or monitor effectiveness. • Can miss minority groups.
Email feedback	A cost-effective and easy way to obtain ideas on an issue or a range of issues.	Inform – Consult	<ul style="list-style-type: none"> • A quicker form of participation and may be attractive to those with little time. • Can ask specific questions and, potentially, have then answered. 	<ul style="list-style-type: none"> • Emails received must be tracked carefully to make sure that they are acknowledged and, where this commitment has been given, responded to. • A community member may believe the email is a properly made submission, when it may not be.

Tool	Description	Level of Participation <i>Inform-Consult-Involve-Collaborate-Empower</i>	Benefits	Considerations
Hotlines	Information provided through a 1-800 number.	Inform	<ul style="list-style-type: none"> • Creates a single point of contact for enquiries and requests for information. • Allows community members to speak directly about their concerns and questions. 	<ul style="list-style-type: none"> • Activation required to generate interest.
Public meetings	Opportunity for stakeholders to voice their point of view on important issues. Require a strong moderator to ensure meeting flow properly.	Inform – Consult	<ul style="list-style-type: none"> • Offers community opportunity to attend and have opinion heard. • Allows for most important issues to be raised and gives people for whom these issues are most relevant opportunity to discuss. • Can enable community members to share issues and to move on. 	<ul style="list-style-type: none"> • Difficult to get a nuanced understanding from a single meeting. • Challenging for quieter community members. • Tendency to focus on the squeaky wheels and those who are confident enough to speak in front of a large group. • Potential for a mob mentality to form.
Telephone surveys/polls	Structured and quantitative responses on specific issues.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Good way to quickly assess current awareness of, and attitude towards, particular issues. • A simple vote on a topic will give an indication of the level of local awareness and support. • Opportunity to capture views of community members who may not actively engage in a planning process or attend public displays or meetings. • Provides input from a cross-section of the community, which can be randomly selected and provide a statistically valid sample. • Higher response rate than mailed surveys, as participants are recruited and researchers continue until they have achieved their sample size. 	<ul style="list-style-type: none"> • More expensive to deliver and more labor intensive than mailed surveys.

Tool	Description	Level of Participation <i>Inform-Consult-Involve-Collaborate-Empower</i>	Benefits	Considerations
Interviews	A standard set of questions posed to individuals. Data gathered must be carefully analyzed to provide an accurate representation of public opinion.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Provides important qualitative information about community perceptions of planning projects, or observations about their local community, at a level of detail that can be difficult to obtain by any other method. • Good way of raising community understanding about planning concepts. • Good way of finding and recruiting other community members who may be able to help with other engagement techniques. • Opportunity for in-depth information. 	<ul style="list-style-type: none"> • Expensive and more labor intensive, depending on the number of community members being interviewed.
Small group meetings	Generate discussion and insight on aspects of a project from a known group of stakeholders. Need a clear agenda and strong facilitator to keep the meeting on track.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Opportunity for planners to have a more detailed conversation about projects and process with interested community members. • Opportunity to meet with community groups that support people with disabilities, older people, younger people, and indigenous people. 	<ul style="list-style-type: none"> • May need to reimburse group members for travel and offer meals if meeting lasts longer than two hours. • Not a broad sample from which to draw.
Public displays/Community events	Present at a local venue to gain informal input from a broad cross-section of stakeholders.	Inform – Consult	<ul style="list-style-type: none"> • Allows community members to discuss concerns about projects with local government planners. • Allows community members to gather information about projects and processes, and share their views. • A wider cross-section of community members is able to attend. • Opportunity to share accurate information about projects and process. 	<ul style="list-style-type: none"> • Potential for lack of clarity in purpose. • Requires intensive staff resources.

Tool	Description	Level of Participation <i>Inform-Consult-Involve-Collaborate-Empower</i>	Benefits	Considerations
Open houses	An informal event that provides information relating to a range of topics and issues. Multiple engagement techniques can be used to encourage and capture conversation.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Open invitation, so all interested community members can attend. • Selection of engagement techniques depends on the nature of the topic and the purpose of the engagement process. • Food and entertainment can be provided to encourage attendance. If this is the case, event could also be referred to as a festival or a fair. 	<ul style="list-style-type: none"> • Based on scale and number of interested participants, events could be expensive to hold. • Robust information-capture processes need to be in place.
Workshops	Stakeholders, project team, planning and design professionals, technical experts, and community members who work in small groups to present ideas and approaches to a defined problem or opportunity.	Inform – Consult – Involve – Collaborate	<ul style="list-style-type: none"> • Broad consensus of stakeholders and community representatives in a short period. • Opportunity to build an understanding of design processes with community members. 	<ul style="list-style-type: none"> • Resource intensive, but effective method for working through complex problems relatively quickly. • Lead time for planning is resource intensive.
Steering groups	A group of high-level stakeholders or experts who provide guidance on key issues. These are not usually representative of the broader community, but more a panel of experts who guide decision making.	Inform – Consult – Involve – Collaborate	<ul style="list-style-type: none"> • The purpose can vary greatly from members providing their own feedback or ideas about planning processes, to members acting as a conduit between the broader community and organization. • Can lead to stakeholder decision making and input over time, depending on the terms of the group. 	<ul style="list-style-type: none"> • Defining demographic relevance can be challenging. • Not all parties may be adequately represented. • Power dynamics may emerge and stifle authentic engagement.
Community reference groups	A broad-based structured group of stakeholders and community representatives who meet regularly and operate under clear terms and objectives.	Inform – Consult – Involve – Collaborate	<ul style="list-style-type: none"> • The purpose can vary greatly from members providing their own feedback or ideas about planning processes, to members acting as a conduit between the broader community and organization. • Can lead to stakeholder decision making and input over time 	<ul style="list-style-type: none"> • Can involve a slow-paced decision-making process. • Can be good for broad consensus, but not necessarily demographically representative.

Tool	Description	Level of Participation <i>Inform-Consult-Involve-Collaborate-Empower</i>	Benefits	Considerations
Resident panels	Large number of people who are selected to be representative of the population to deliberate on a range of issues over a set period.	Inform – Consult – Involve – Collaborate	<ul style="list-style-type: none"> • If recruitment process is rigorous, resident panels can be effective method for securing input from a representative sample of community members over time. • Provides opportunity for community members to understand planning concepts and process. 	<ul style="list-style-type: none"> • Can be expensive and resource intensive to manage both recruitment and management time. • Members may confuse the panel's deliberative process with a decision-making role.
Engagement apps	Mobile platforms that engage audiences who are unlikely to attend traditional engagement events, and to reach younger and more mobile audiences.	Inform – Consult – Involve	<ul style="list-style-type: none"> • A broad range of information types can be loaded into an app including interactive content. • Can gather live data. • Mobile usage is at an all-time high. • Cost-effective way to engage people where they are, essentially bringing engagement to them. • As new engagement tools emerge, they can be loaded into an app, which can function as a platform for progressive advancements and additions to the engagement tool. 	<ul style="list-style-type: none"> • Resources to develop content. • Time to allow for approvals and uploading of apps to Apple and GooglePlay. • A degree of technological comfort is required to use apps. • This type of technology may not be appropriate for all comments.
Social media	Online social engagement platforms that allow for broad based comments and feedback.	Inform – Consult	<ul style="list-style-type: none"> • More direct format to submit ideas and provide feedback. • High usage levels. • Good for overcoming geographic constraints. • Relatively easy to create and share content. 	<ul style="list-style-type: none"> • Anonymity and lack of control present a challenge. • Requires participants to have an account. • Monitoring can be labor intensive.
Online survey/polling tools	A quick and effective way to get a snapshot of community sentiment.	Inform – Consult – Involve	<ul style="list-style-type: none"> • More direct format to submit ideas and provide feedback. • High usage levels. • Good for overcoming geographic constraints. • Relatively easy to create and share content. 	<ul style="list-style-type: none"> • Anonymity and lack of control present a challenge. • Requires participants to have an account. • Monitoring can be labor intensive.

Tool	Description	Level of Participation <i>Inform-Consult-Involve- Collaborate-Empower</i>	Benefits	Considerations
Online survey/ polling tools	A quick and effective way to get a snapshot of community sentiment.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Good for fast data and community sentiment in relation to emergent issues. • Quantitative data. • Relatively cost effective. 	<ul style="list-style-type: none"> • No complexity of data. • No opportunity to interrogate data in more detail.
Hardcopy surveys/ questionnaires	A standard set of questions conducted through face-to-face interviews, self-completion, over the phone, or electronically.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Popular method of collecting point-in-time qualitative and quantitative information from a population. • Good way to find out opinions of local people on a particular planning topic in a structured way that can be extensively analyzed. • Good way to inform people about the project. • Good way to reach many people and involve those who may not be able to engage in other ways. • Input from those who may not attend public meeting. • Provides a mechanism for extending a mailing list. • Provides a cross-section of the community, not only activists. 	<ul style="list-style-type: none"> • Response rate can be low. • To get statistically valid results, can be labor intensive and expensive. • Level of detail may be limited. • Less effective in obtaining responses to complex issues. • Effective analysis of data can be labor intensive and requires a high level of expertise.
Online forums	A virtual gathering space for stakeholders to connect and share ideas, thoughts, and recommendations. Forums can be open or closed. Recruitment of participants is critical as are rules of engagement. These may have a formal moderator or be self-moderated.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Can build a robust community and deep relationship over time. • Allows engagement based on participants' time and availability. • Great potential for detailed qualitative data. • Can be moderated by a community manager or self-moderated. • Can be an open or closed forum. 	<ul style="list-style-type: none"> • Can be expensive if additional website functionality is required. • Strong moderation is necessary for success. • Can be resource intensive, requiring maintenance, review and refresh of content, and monitoring and responding to community comments.

Tool	Description	Level of Participation <i>Inform-Consult-Involve-Collaborate-Empower</i>	Benefits	Considerations
Gamefication	The use of game thinking and game mechanics in a non-game context to engage users in solving problems.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Can provide a fun way to encourage community participation and greater community understanding of project concepts. • Helps users to explore scenarios, understand impacts of planning choices, or to understand different perspectives. 	<ul style="list-style-type: none"> • May not be appropriate for your engagement purposes. • Concept or idea may not be compelling enough for people to play it.
Conversation kits	Self-guided discussion that allows interested community members to explore and contribute to planning processes at their own pace and at a location of their choice.	Inform – Consult – Involve	<ul style="list-style-type: none"> • Allows community members to engage in conversation about project processes and concepts in an environment they feel comfortable in. • Helps to build social networks within the community. • If background information is well designed and easy to understand, community awareness and understanding will improve. • Kits can be designed for use in school environments. 	<ul style="list-style-type: none"> • Relies on community members being motivated to access and use kit, and capture and submit a record of the conversation. • Success relies on comprehensive promotion of the kit.
Community summits	An event that brings together many participants to explore and discuss an issue. These can be interactive, collaborative, and deliberative. Participants can either be selected or self-nominate.	Inform – Consult – Involve – Collaborate	<ul style="list-style-type: none"> • The approach to participant selection can range from invitation-only, directly invited randomly selected community members, self-nominated, or a combination of all three of these approaches. • The selection of engagement techniques incorporated as part of the summit is dependent on the purpose of the event and the budget. • Depending on approach and topic, summits can attract considerable media interest. 	<ul style="list-style-type: none"> • Event needs to incorporate feedback processes, so that participants can understand what has been discussed. • Based on scale and number of participants, event can be expensive to stage.

Appendix B.

Community Profile Overview

Community Profile Overview

Purpose & Contents of the Community Profile

The purpose of the Clackamas County Community Profile is to take the opportunity to ground staff at the Department of Transportation and Development (DTD) in our current community context and the history of how our governmental agency, Clackamas County, got to where we are now. This grounding is important before launching into the county's Transportation Systems Plan update. Additionally, this equity analysis is intended to build a more comprehensive understanding of the county's growth and development over the last three and a half centuries¹ with specific attention to how some communities were negatively impacted by government policies, processes, and practices and how that legacy of exclusion and marginalization continues to manifest today. Considering the limitations discussed in Section 3, this Community Profile offers a stronger foundation in our cultural and historical context, enabling Clackamas County and its government to advance these processes in a more positive, inclusive way that benefits all residents.

This Community Profile also fulfills requirements instituted through the Climate-Friendly and Equitable Communities (CFEC) program, adopted by the Oregon Land Conservation and Development Commission (LCDC) in April 2023. The CFEC rule amendments have two goals. The primary goal is to reduce transportation-related climate pollution through the promotion of cleaner vehicles, cleaner fuels, and development patterns that require less driving.² The second is to establish standards for more equitable planning processes and outcomes for all Oregonians, but especially those who have been or are currently marginalized by land use and transportation policies.³

The Community Profile is divided into three sections:

Section 1- Historical and Cultural Context: Section one shares a high-level history of original inhabitants, migration, settlement, growth and change in population and development in Clackamas County. It provides context for Clackamas County's existing transportation systems and underscores how discriminative policies—specifically those related to housing, transportation, zoning, and land use have excluded and harmed priority populations identified in CFEC rules. This section also highlights how the

¹ While indigenous communities have occupied this land for thousands of years, the early 1800s is when maritime trade and colonization began along the west coast and in Oregon, resulting in changes in demographics and western practices in Oregon.

² Reducing climate pollution by reducing dependence on automobiles has been a state priority since 1991 when the first administrative rules were adopted to implement Oregon Statewide Planning Goal 12 Transportation. For a history of rule adoption, see Planning the Oregon Way: A Twenty-Year Evaluation. Chapter 6: https://pdxscholar.library.pdx.edu/cgi/viewcontent.cgi?article=1049&context=usp_fac

³ Such groups are identified in Oregon Administrative Rule (OAR) 660-012-0125 as Underserved Populations. See: <https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=293002>

evolution of settlement, urbanization, and transportation impact public health. Lastly, this section concludes with a more recent history of some actions the county has taken to redress past and current discrimination and promote public health in the built environment.

Section 2- Socio-Demographics in Clackamas County: Section two uses best available data to share socio-demographic information about people living in Clackamas County today, with a focus on the priority populations defined in Oregon Administrative Rule (OAR) 660-012-0125. Data is shared for unincorporated Clackamas County specifically, when possible, given the scope of the CFEC requirements and jurisdiction of the Department of Transportation and Development. It's important to note that while aggregate data does not provide a comprehensive understanding of any population, this section offers a starting point that requires additional exploration of understanding where communities live throughout the County in partnership with community organizations who serve these groups.

Section 3- Supporting Information and Appendices:⁴ Section three provides additional information and resources to better understand sections one and two. Section three also includes acknowledgement of groups and individuals that contributed to this report, the limitations of this document, and terms used throughout the document.

Information in these sections will inform various aspects of the Transportation Systems Plan (TSP) and other transportation planning efforts. Specifically, it will inform the development of a Decision-Making and Engagement with Underserved Populations Framework which will set the foundation for equitable engagement practices, guidance for funding allocation, and metrics for successful engagement for all transportation planning projects.

⁴ Note to the reader, if social justice concepts and report limitations are unfamiliar concepts, we recommend reviewing this section first.

Appendix C.

Tips for Honoring Multi-Faith Holidays (2025)

Tips for Honoring Multi-Faith Holidays

Why is awareness of religious observances and culture important?

Alignment with RiSE culture

- Safety, Well-Being, and Belonging
- Honor and Value Each Other
- Equitable Treatment and Racial Justice
- Collective Responsibility and Growth
- Meaningful Participation and Shared Power
- Interconnected Communities

Working towards the Equity North Star

- Inclusivity, Well-Being, Equity, and Service

How to Create an Inclusive Environment

Be Aware



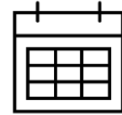
Be aware of self-identified colleagues and community partners who may observe faith-based holidays.

Plan Well



Avoid booking meetings and events on/during the most sacred faith-based holidays.

Be Flexible



Work to accommodate needed time off or temporary schedule changes.

Inclusivity



Not everyone shares the same customs, beliefs, or views. Be willing to learn something new.

Collaborate



Work to build relationships and understanding year-round, not just during holiday seasons.

Don't Assume



Individuals may observe differently, even within the same faith tradition.

Have questions or need support?
Maria Waters, Faith Community Liaison
Maria.Waters@odhs.oregon.gov



This tool highlights some of the commonly observed faith-based holidays in Oregon that are likely to have traditions and practices that may directly impact regular work activities.

Note – This not meant to prioritize importance of some holidays over others.

January 2025

January 7 - Orthodox Christmas: Orthodox Christians who use the Julian calendar celebrate the birth of Jesus. This day is observed by spending time at places of worship and exchanging gifts.

January 19 - World Religion Day: the Bahá'í faith celebrates this day highlighting common themes across various faiths and religions. This day is often observed by hosting workshops and conversations that advance mutual understanding, recognition, and reciprocity of respect among all religions.

February 2025

February 2 - Imbolc: A Pagan and Wiccan festival that marks the halfway point between winter solstice and spring equinox. This day celebrates fire, light and the return of life. This may be a day where observers request the day off to perform rituals honoring the seasonal cycle.

February 28 - March 2 - Losar: Tibetan New Year. Tibetan Buddhists celebrate by putting on festivals, spending time with family, and participating in traditional ceremonies.

March 2025

March 1 – March 30 - Ramadan: observed by Muslims and is considered the holiest month. Many Muslims fast, refraining from food and drink from sunrise to sunset. Schedule flexibility may be requested to participate in rituals and traditions. *Exact start date is dependent on the first sighting of the crescent moon.

March 5 - Ash Wednesday: The start of Lent, a 40-day period of prayer and fasting celebrated by Christians before Easter. Catholics may participate in fasting from food and also receive ash in the shape of a cross on their forehead.

March 14 - Holi: Hindu Festival that celebrates spring, love, and new life. Celebrated with a festival of bright colors, both in decoration and worn on the body.

March 19-20 - Naw Ruz or Nowruz: Bahá'í and Persian New Year. This is a day of gathering and celebration, feasting, and exchanging of presents.

March 30 - 31 - Eid al-Fitr: Marks the end of Ramadan for Muslims. Muslims typically enjoy a large feast, exchanging of gifts and money, and gathering in homes and mosques.

April 2025

April 14 - Vaisakhi (Baisakhi): Solar New Year and Spring festival celebrated by Sikhs' honoring the day in 1699 when Sikhism was born as a faith. Sikhs will often spend time at their place of worship on this day in addition to celebrations.

April 12 - 20 - Passover: Observed by Jews commemorating the Israelites being freed from slavery in Egypt. There are several rituals and specific meals that are observed during this time with dietary restrictions. Some observers may request time off during the first two and last two days of this holiday.

April 20 - Easter and Orthodox Easter: The most holy holiday in Christianity celebrating the resurrection of Jesus Christ. Individuals who celebrate Easter may request time off the Friday before to observe Good Friday in addition to the Sunday Easter is celebrated

April 21 - First Day of Ridván: The most important of the Bahá'í holy days in which Bahá'u'lláh declared His mission as a Messenger of God. Bahá'ís may take the day off work and school to gather in prayer and celebration.

May 2025

May 1 - Beltane: A Pagan and Wiccan festival honoring life. This day marks the peak of spring and the beginning of summer. This day is often marked by dancing, rituals, and feasts.

May 12 - Vesak: A festival that observes the birth, death, and enlightenment of the Buddha. Theravada Buddhists may adhere to dietary restrictions. Some may wear white clothes on this day and participate in community celebrations and traditions.

June 2025

June 8 - Race Unity Day: A Baha'i holiday promoting racial harmony and understanding. Community meals and gatherings to expand knowledge and participate in learning about other cultures are held on this day.

June 2-3 - Shavuot: A Jewish holiday commemorating the revelation of the Torah to the Jewish people. Individuals typically participate in gatherings at their synagogue. Some may abstain from working or using some modern conveniences such as electricity or the telephone.

June 7 - 10 - Eid al-Adha: Muslim holiday marking the end of the Hajj pilgrimage to Mecca, which takes place in the 12th month of the Islamic calendar (Dhul Hijjah). During the nine days leading up to Eid al-Adha, Muslims may fast from food and drink, particularly on the Day of Afrah, expected to fall on June 5, 2025, depending on the sighting of the moon.

June 11 - Saga Dawa Düchen: This is the most holy day of the year for Tibetan Buddhists. This month-long festival honors Buddha Sakyamuni whose birth, enlightenment, and nirvana all took place in the same month and reaches its peak on June 11th.

September 2025

September 23 - 24 - Rosh Hashanah: The Jewish New Year. Many mark this day with feasts and celebrations. Some will take off work one or both days.

October 2025

October 2 - Yom Kippur: The most holy day of the Jewish faith. Jews fast from food and drink on this day as well as refrain from certain activities. Some will take off work this day.

October 2 - Dussehra: Hindus celebrate the victory of good over evil. Special prayer meetings and food offerings are offered to the gods.

October 7 - 13 - Sukkot and Simchat Torah- Sukkot is the 8-day Jewish festival of harvest and thanksgiving. **Shemini Atzeret** is the eighth and final day of Sukkot, on high special memorial prayers are said. **Sukkot** occurs a week after Yom Kippur. Some may take off the first two days and last two days of the holiday.

October 20 - Diwali: The festival of lights, a 5-day festival celebrating the triumph of light over darkness. Celebrated by Hindus, Sikhs, and Jains. Individuals celebrating Diwali typically take place in festival centered around food, fireworks, and sand art.

October 31 - November 1 - Samhain: A Pagan and Wiccan holiday marking the end of the harvest season. Observance starts the night before. Observers participate in dancing, spending time in nature, and building altars for their ancestors.

November 2025

November 1 -2 - All Saints Day, All Souls Day and Day of the Dead: Days in the Catholic church that honor the dead as well as men and women who have been canonized in the Catholic Church.

- All Saints and All Souls day usually involves visiting a place of worship for traditions honoring loved ones who have passed away.
- Dia de los Muertos (Day of the Dead) often involves making alters, dancing, and celebrations reuniting the living and the dead.

December 2025

December 15 - 22 - Hanukkah: A Jewish celebration known as the “festival of lights” honoring the victory of Jews over Syrian Greeks. Celebrations usually take place in the evenings and are centered around special foods, games, and traditions.

December 21 - January 1 - Yule: A Pagan and Wiccan holiday that celebrates winter solstice. Pagans participate in rituals, decorating of trees, feasts, and exchanging gifts.

December 25 - Christmas: A Christian holiday commemorating the birth of Jesus Christ. Christians often celebrate by attending church services, exchanging gifts, and spending time with family and friends.

Appendix D.

Thematic Analysis FAQ

Thematic Analysis FAQ

What is Thematic Analysis?

Thematic analysis is a qualitative research method that focuses on identifying, analyzing, and reporting patterns or themes within a dataset – including qualitative data collected from community engagement efforts. Thematic analysis involves reading through a data set, identifying patterns in meaning, and deriving themes, providing a systematic and flexible way to interpret various aspects of the research topic.

The primary purpose of thematic analysis is to uncover and make sense of the collective or shared meanings and experiences within a dataset. Staff or consultants can use this method to draw meaningful information and conclusions for their project or plan.

When to Conduct Thematic Analysis?

Consider the available community data and reports you have available from past or related projects/plans. Often survey findings, engagement reports, or other summaries will offer information and insight into your project and a deep dive into the raw data¹ (e.g. interview or focus group transcript, list of community comments on a project or plan, initial survey results) may not be necessary. If it is determined that a revisit of raw data would allow your project/plan to extract more relevant themes, information, and insight it would be appropriate to conduct a deductive thematic analysis on those raw data sources.

How to Conduct Thematic Analysis on Existing Community Data?

Review the resources below, *Analyzing Qualitative Data* from the University of Wisconsin-Extension

¹ Raw data is data collected from one or multiple sources that remains in its unaltered initial state.



University of Wisconsin-Extension
Cooperative Extension
Madison, Wisconsin



Program Development & Evaluation

2003

**Ellen Taylor-Powell
Marcus Renner**

Analyzing Qualitative Data

Introduction

Qualitative data consist of words and observations, not numbers. As with all data, analysis and interpretation are required to bring order and understanding. This requires creativity, discipline and a systematic approach. There is no single or best way.

Your process will depend on:

- the questions you want to answer,
- the needs of those who will use the information, and
- your resources.

This guide outlines a basic approach for analyzing and interpreting narrative data — often referred to as **content analysis** — that you can adapt to your own extension evaluations. For descriptions of other types of qualitative data analysis, see Ratcliff, 2002. Other techniques may be necessary for analyzing qualitative data from photographs and audio or video sources.

This booklet is a companion to *Analyzing Quantitative Data* G3658-6 in this series.

Narrative data

Text or narrative data come in many forms and from a variety of sources. You might have brief responses to open-ended questions on a survey, the transcript from an interview or focus group, notes from a log or diary, field notes, or the text of a published report. Your data may come from many people, a few individuals, or a single case.

Any of the following may produce narrative data that require analysis.

- **Open-ended questions and written comments on questionnaires** may generate single words, brief phrases, or full paragraphs of text.
- **Testimonials** may give reactions to a program in a few words or lengthy comments, either in person or in written correspondence.
- **Individual interviews** can produce data in the form of notes, a summary of the individual's interview, or word-for-word transcripts.
- **Discussion group or focus group interviews** often involve full transcripts and notes from a moderator or observer.
- **Logs, journals and diaries** might provide structured entries or free-flowing text that you or others produce.
- **Observations** might be recorded in your field notes or descriptive accounts as a result of watching and listening.
- **Documents, reports and news articles** or any published written material may serve as evaluation data.
- **Stories** may provide data from personal accounts of experiences and results of programs in people's own words.
- **Case studies** typically include several of the above.

The analysis process

Once you have these data, what do you do? The steps below describe the basic elements of narrative data analysis and interpretation. This process is fluid, so moving back and forth between steps is likely.

Step 1 Get to know your data.

Good analysis depends on understanding the data. For qualitative analysis, this means you read and re-read the text. If you have tape recordings, you listen to them several times. Write down any impressions you have as you go through the data. These impressions may be useful later.

Also, just because you have data does not mean those are quality data. Sometimes, information provided does not add meaning or value. Or it may have been collected in a biased way.

Before beginning any analysis, consider the quality of the data and proceed accordingly. Investing time and effort in analysis may give the impression of greater value than is merited. Explain the limitations and level of analysis you deem appropriate given your data.

Step 2 Focus the analysis.

Review the purpose of the evaluation and what you want to find out. Identify a few key questions that you want your analysis to answer. Write these down. These will help you decide how to begin. These questions may change as you work with the data, but will help you get started.

How you focus your analysis depends on the purpose of the evaluation and how you will use the results. Here are two common approaches.

Focus by question or topic, time period or event.

In this approach, you focus the analysis to look at how all individuals or groups responded to each question or topic, or for a given time period or event. This is often done with open-ended questions. You organize the data by question to look across all respondents and their answers in order to identify consistencies and differences. You put all the data from each question together.

You can apply the same approach to particular topics, or a time period or an event of interest. Later, you may explore the connections and relationships between questions (topics, time periods, events).

Focus by case, individual or group.

You may want an overall picture of:

- **One case** such as one family or one agency.
- **One individual** such as a first-time or teen participant in the program.
- **One group** such as all first-time participants in the program, or all teens ages 13 to 18.

Rather than grouping these respondents' answers by question or topic, you organize the data from or about the case, individual or group, and analyze it as a whole.

Or you may want to combine these approaches and analyze the data both by question and by case, individual or group.

Step 3 Categorize information.

Some people refer to categorizing information as coding the data or indexing the data. However, categorizing does not involve assigning numerical codes as you do in quantitative analysis where you label exclusive variables with preset codes or values.

To bring meaning to the words before you:

- **Identify themes or patterns** — ideas, concepts, behaviors, interactions, incidents, terminology or phrases used.
- **Organize them into coherent categories** that summarize and bring meaning to the text.

This can be fairly labor-intensive depending on the amount of data you have. **But this is the crux of qualitative analysis.** It involves reading and re-reading the text and identifying coherent categories.

You may want to assign abbreviated codes of a few letters, words or symbols and place them next to the themes and ideas you find. This will help organize the data into categories. Provide a descriptive label (name) for each category you create. Be clear about what you include in the category and what you exclude.

As you categorize the data, you might identify other themes that serve as subcategories. Continue to categorize until you have identified and labeled all relevant themes.

The following examples show categories that were identified to sort responses to the questions.

Question	Categories
	<i>Responses to the question were sorted into:</i>
1. What makes a quality educational program?	Staff (Stf), relevance (Rel), participation (Part), timeliness (Time), content (Con)
2. What is the benefit of a youth mentoring program?	Benefits to youth (Y), benefits to mentor (M), benefits to family (Fam), benefits to community (Comm)
3. What do you need to continue your learning about evaluation?	Practice (P), additional training (Trg), time (T), resources (R), feedback (Fdbk), mentor (M), uncertain (U)

Possible code abbreviations are designated in parentheses.

Here are two ways to categorize narrative data — using preset or emergent categories.

Preset categories

You can start with a list of themes or categories in advance, and then search the data for these topics. For example, you might start with concepts that you really want to know about. Or you might start with topics from the research literature.

These themes provide direction for what you look for in the data. You identify the themes **before** you categorize the data, and search the data for text that matches the themes.

Emergent categories

Rather than using preconceived themes or categories, you read through the text and find the themes or issues that recur in the data. These become your categories. They may be ideas or concepts that you had not thought about.

This approach allows the categories to **emerge** from the data. Categories are defined **after** you have worked with the data or as a result of working with the data.

Sometimes, you may combine these two approaches — starting with some preset categories and adding others as they become apparent.

Your initial list of categories may change as you work with the data. This is an iterative process. You may have to adjust the definition of your categories, or identify new categories to accommodate data that do not fit the existing labels.

Main categories may be broken into subcategories. Then you will need to resort your data into these smaller, more defined categories. This allows for greater discrimination and differentiation.

For example, in the question about benefits of a youth mentoring program, data within the category benefits to youth might be broken into a number of subcategories.

Question	Categories
What is the benefit of a youth mentoring program?	Benefits to youth (Y)
	School performance (Y-SP)
	Friendship (Y-Friends)
	Self-concept (Y-SC)
	Role modeling (Y-RM)
	Benefits to mentor (M)
	Benefits to family (Fam)
	Benefits to community (Comm)

Subcategories

Continue to build categories until no new themes or subcategories are identified. Add as many categories as you need to reflect the nuances in the data and to interpret data clearly.

While you want to try to create mutually exclusive and exhaustive categories, sometimes sections of data fit into two or more categories. So you may need to create a way to cross-index.

Reading and re-reading the text helps ensure that the data are correctly categorized.

Example 1 shows labeling of one open-ended question on an end-of-session questionnaire. In this example, all responses were numbered and given a label to capture the idea(s) in each comment. Later, you can sort and organize these data into their categories to identify patterns and bring meaning to the responses.

Example 1. Labeling data from an end-of-session questionnaire (21 respondents)

Categories: Practice (P), additional training (Trg), time (T), resources (R), feedback (Fdbk), mentor (M), uncertain (U)

3-13-02 Evaluation Workshop, Madison

Q 5. What do you need next to continue your learning about evaluation?

Line 7 is left uncoded because "Yes" is not usable data.

- | | | |
|---------|----|---|
| Trg | 1 | More advanced data analysis |
| T, R | 2 | More time/information on all the same concept |
| P | 3 | Just start doing them |
| Trg | 4 | Another workshop |
| Fdbk | 5 | Assessment feedback on how beneficial (or how well I did) the evaluation of my project was for USDA |
| Trg | 6 | How to measure long range planning outcomes |
| | 7 | Yes |
| P | 8 | Do it! |
| Trg | 9 | Need additional training and review |
| P | 10 | Practice makes perfect |
| T | 11 | Time to do actual reports |
| T, Fdbk | 12 | Time to complete an actual project report using this framework. Constructive feedback on strengthening that report. |
| Trg | 13 | More on how to decide evaluation reporting at the beginning of the grant or as you write the grant |
| P, M | 14 | Practice what I learned with assistance of a mentor |
| U | 15 | Unsure until I use the new ideas I've learned here. |
| P | 16 | Apply what I have learned |
| Trg | 17 | I need more training on analyzing data (need very basic hands on exercises) – maybe more exercises on indicators |
| Trg | 18 | Would have liked to go to observation interview training too! |
| R | 19 | More specific examples, i.e. completed logic models for different topics |
| U | 20 | Not sure yet. I'll know when I sit down to writing report. |
| R, P | 21 | Research suggested resources — develop more surveys – trial and error till I become perfect |

Step 4 Identify patterns and connections within and between categories.

As you organize the data into categories — either by question or by case — you will begin to see patterns and connections both within and between the categories. Assessing the relative importance of different themes or highlighting subtle variations may be important to your analysis. Here are some ways to do this.

Within category description

You may be interested in summarizing the information pertaining to one theme, or capturing the similarities or differences in people's responses within a category. To do this, you need to assemble all the data pertaining to the particular theme (category).

What are the key ideas being expressed within the category? What are the similarities and differences in the way people responded, including the subtle variations? It is helpful to write a summary for each category that describes these points.

Larger categories

You may wish to create larger **super categories** that combine several categories. You can work up from more specific categories to larger ideas and concepts. Then you can see how the parts relate to the whole.

Relative importance

To show which categories appear more important, you may wish to count the number of times a particular theme comes up, or the number of unique respondents who refer to certain themes. These counts provide a very rough estimate of relative importance. They are not suited to statistical analysis, but they can reveal general patterns in the data.

Relationships

You also may discover that two or more themes occur together consistently in the data. Whenever you find one, you find the other. For example, youth with divorced parents consistently list friendship as the primary benefit of the mentoring program.

You may decide that some of these connections suggest a cause and effect relationship, or create a sequence through time. For example, respondents may link improved school performance to a good mentor relationship. From this, you might argue that good mentoring causes improved school performance.

Such connections are important to look for, because they can help explain **why** something occurs. But be careful about simple cause and effect interpretations. Seldom is human behavior or narrative data so simple.

Ask yourself: How do things relate? What data support this interpretation? What other factors may be contributing?

You may wish to develop a table or matrix to illustrate relationships across two or more categories.

Look for examples of responses or events that run counter to the prevailing themes. What do these countervailing responses suggest? Are they important to the interpretation and understanding? Often, you learn a great deal from looking at and trying to understand items that do not fit into your categorization scheme.

Step 5 Interpretation – Bringing it all together

Use your themes and connections to explain your findings. It is often easy to get side tracked by the details and the rich descriptions in the data. But what does it all mean? What is really important?

This is what we call **interpreting the data** — attaching meaning and significance to the analysis.

A good place to start is to develop a list of key points or important findings you discovered as a result of categorizing and sorting your data.

Stand back and think about what you have learned. What are the major lessons? What new things did you learn? What has application to other settings, programs, studies? What will those who use the results of the evaluation be most interested in knowing?

Too often, we list the findings without synthesizing them and tapping their meaning.

Develop an outline for presenting your results to other people or for writing a final report. The length and format of your report will depend on your audience. It is often helpful to include quotes or descriptive examples to illustrate your points and bring the data to life. A visual display might help communicate the findings.

Sometimes a diagram with boxes and arrows can help show how all the pieces fit together.

Creating such a model may reveal gaps in your investigation and connections that remain unclear. These may be areas where you can suggest further study.

“Nuts and bolts” of narrative analysis

Moving from a mass of words to a final report requires a method for organizing and keeping track of the text. This is largely a process of **cutting and sorting**.

Work by hand, either with a hard copy (print copy) or directly on the computer. Exactly how you manage the data depends on your personal preference and the amount and type of qualitative data you have. Here are some data management tips:

- **Check your data.** Often, there are data from multiple respondents, multiple surveys or documents. Make sure you have everything together. Decide whether the data are of sufficient quality to analyze, and what level of investment is warranted.
- **Add ID numbers.** Add an identification (ID) number to each questionnaire, respondent, group or site.
- **Prepare data for analysis.** You may need to transcribe taped interviews. How complete to make your transcription depends on your purpose and resources. Sometimes, you may make a summary of what people say, and analyze that. Or certain parts of an interview may be particularly useful and important and just those sections are transcribed. Other times, you will want to have every word of the entire interview. However, transcription is time-consuming. So be sure both data quality and your use of the data are worth the investment.

With small amounts of narrative data, you may work directly from the original hard copy. However, text is usually typed into a computer program. In extension, we typically type into a word processing program (Microsoft Word or Word Perfect) or into Excel.

You may decide to use a relational data base management program such as ACCESS, or a special qualitative data analysis program.

Your decision depends on the size of your data set, resources available, preferences, and level of analysis needed or warranted.

Decide whether you will enter all responses question by question, or whether you want to keep all text concerning one case, individual, group or site together (see Step 2). Save the file.

If you type the data into a word processing program, it is helpful to leave a wide margin on the left so you have space to write labels for text and any notes you want to keep. Number each line to help with cutting and sorting later.

Computer software

Several software programs — for example, Ethnograph and NUD*IST — specifically analyze qualitative data. They systematize and facilitate all the steps in qualitative analysis. SAS software will manipulate precategorized responses to summarize open-ended survey questions (see Santos, Mitchell and Pope, 1999). CDC EZ-Text is a freeware program developed by the Centers for Disease Control and Prevention.

For smaller data sets and modest analysis needs, many people work by hand, with a word processing program or spreadsheet.

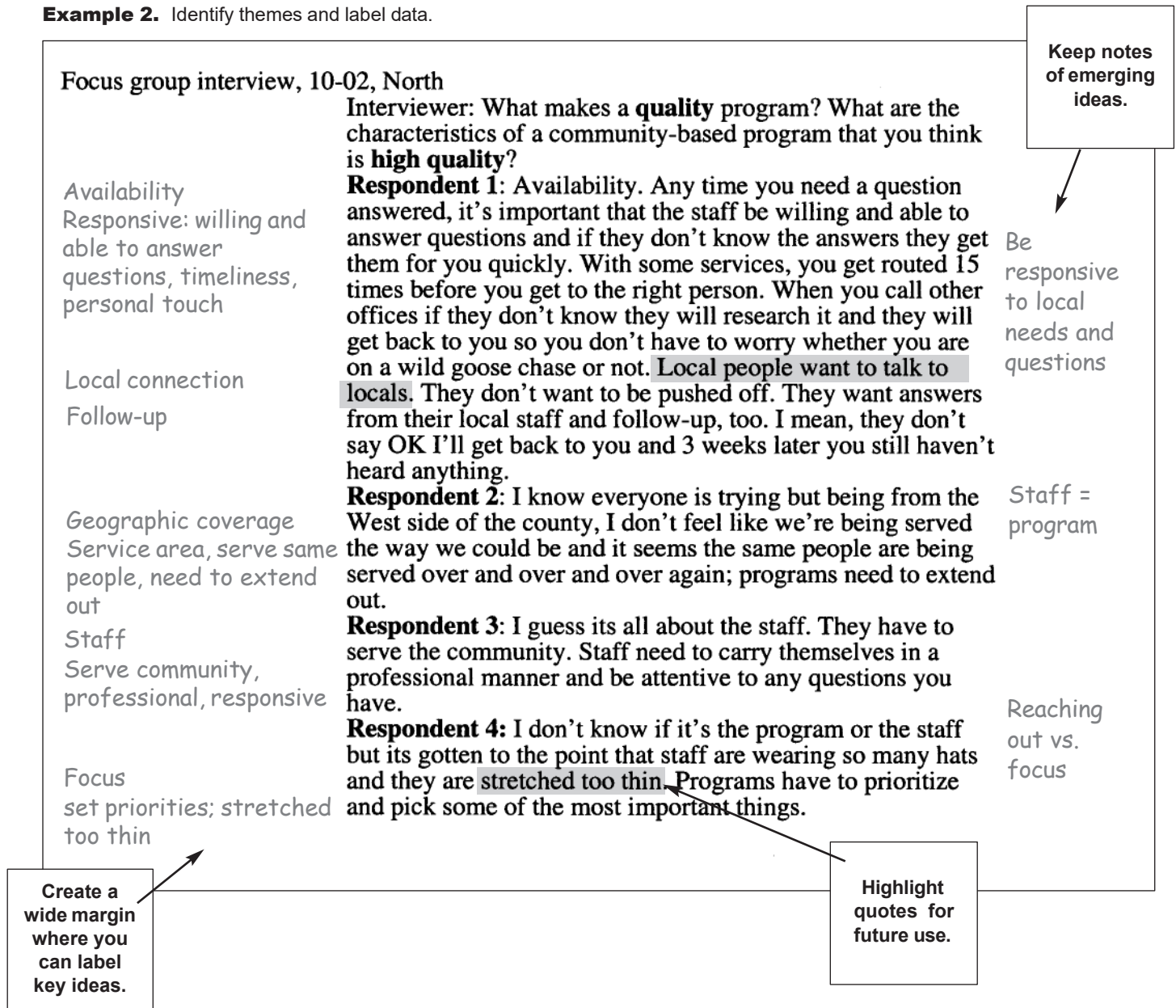
Note: Mention of products is not intended to endorse them, nor to exclude others that may be similar. These are mentioned as a convenience to readers.

- **Make copies.** Make a copy of all your data (hard copy and electronic files). This gives you one copy to work from and another for safekeeping.
- **Identify the source of all data.** As you work with the data, you will need to keep track of the source of the information or the context of the quotes and remarks. Such information may be critical to the analysis. Make sure you have a way to identify the source of all the data, such as by individual, site and date.

Think about what information to keep with the data. For example, you might use identifiers to designate the respondent, group, site, county, date or other source information. Or you may wish to sort by variables such as age, gender or position. Will you want to compare and contrast by demographic variable, site and date?

These identifiers stay with the information as you cut and sort the data, either by hand or in the computer. If you are working with hard copies, you might use different colors of paper to color-code responses from different people or groups (for example, see Krueger, 1998).

- **Mark key themes.** Read through the text. Look for key ideas. Use abbreviations or symbols (codes) to tag key themes — ideas, concepts, beliefs, incidents, terminology used, or behaviors. Or, you might give each theme a different color. Keep notes of emerg-

Example 2. Identify themes and label data.

ing ideas or patterns and how you are interpreting the data. You can write or type these in the margins, or in a specified column. Or keep a separate notebook that records your thoughts and observations about the data (see Example 2).

- **Define categories.** Organize or combine related themes into categories. Name (label) these categories by using your own descriptive phrases, or choose words and key phrases from the text. Be clear about what the category stands for. Would someone unfamiliar with the data understand the label you have chosen? Write a short description or definition for each category,

and give examples or quotes from the text that illustrate meaning. Check with others to see if your labels make sense. You may also describe what the category does not include to clarify what is included.

- **Cut and sort.** Once you define categories and label data, grouping the data into categories involves some form of cutting and sorting. This is a process of selecting sections of data and putting them together in their category.

Hard copy — A simple method is to cut text out of the printed page and sort into different piles. Each pile represents a category and has a name. As you work with the data,

you may make new piles, combine piles, or divide piles into subcategories. Remember to keep the identifier (source of data) with the data so you know where the text came from. Also, remember that you are working with a copy, not the original material.

Electronic copy — It is relatively simple and fast to move text around in a word processing program using the Windows platform. You can cut and paste text into different Windows, each representing a single category. If you type the category label directly into the computer file, you can use the **search** function to gather chunks of text together to copy and paste. Or you can separate the text into paragraphs, code the beginning of each paragraph, and then sort the paragraphs. You may prefer to use Excel. If the data are in Microsoft Word, you can easily transfer them to Excel. Set up an Excel file that includes columns for the ID number, identifiers, categories (themes), codes, and text (see Example 3).

When cutting and sorting, keep track of the source of the data. Be sure to keep identifiers attached to all sections of data.

Keep enough text together so you can make sense of the words in their context. As you cut and move data, text can easily become fragmented and lose its contextual meaning. Be sure to include enough surrounding text so the meaning is not open to misinterpretation.

If data do not seem to fit, place those in a separate file for possible use later.

- **Make connections.** Once you sort the data, think about how the categories fit together and relate. What seems more important, less important? Are there exceptions or critical cases that do not seem to fit? Consider alternative explanations. Explore paradoxes, conflicting themes, and evidence that seems to challenge or contradict your interpretations.

To trace connections, you can spread note cards across a table, use sticky notes on walls, or draw diagrams on newsprint showing the categories and relationships. Another approach is to create a two-dimensional or three-dimensional matrix. List the categories along each axis, and fill the cells with corresponding evidence or data. For further explanation, see Patton, 1990.

You can use simple hand tabulations or a computer program:

- to search and count the frequency a topic occurs or how often one theme occurs with another, or
- to keep track of how many respondents touch on different themes.

Such counts may be illuminating and indicate relative importance. But treat them with caution — particularly when responses are not solicited the same way from all respondents, or not all respondents provide a response.

Example 3. Screen shot of Excel spreadsheet

Example 3.xls					
	A	B	C	D	E
1	Question 2 from survey, Sept 2002	What is greatest impact the community group has had on the community to date?			
2	ID	Category	Code	Narrative	Notes
3	1	Service	FRC	Getting a child care and resource center	
4	2	Collaboration	Focus, common goal	Focused diverse interests on a particular issue. Worked to accomplish goal of mutual interest	
5	3	Service	Parenting info	Increase information on parenting issues	
6	4	Education	Share info	Sharing knowledge of resources between service providers	
7	5	Collaboration	Coor	Bringing together agencies on behalf of the community	
8	6	Education	Parent ed	Parent education	
9	7	Collaboration	interagency effort	Establishment of an interagency effort	
10	8	Service, collaboration	FRC, people together	Getting a family resource center established; brought people together from different groups	
11	9	None yet	None	Nothing as yet. Do have complete faith that we will eventually make a huge difference	
12	10	Service	Res	More resources available in community	
13	11	Service	services	Increased services	
14	12	Collaboration	sense of cohesion	Fostering a sense of cohesiveness among community agencies to address those issues that permeate our society	
15	13	Collaboration	Coordination, common goal	Brings together government employees as well as key school, community offices, etc. All work for a common goal or understanding of each others' needs and programs and serve the public in their best interest.	
16					
17					
18					

Enhancing the process

As with any analysis process, bias can influence your results. Consider the following ways to increase the credibility of your findings.

Use several sources of data.

Using data from different sources can help you check your findings. For example, you might combine one-on-one interviews with information from focus groups and an analysis of written material on the topic. If the data from these different sources point to the same conclusions, you will have more confidence in your results.

Track your choices.

If others understand how you came to your conclusions, your results will be more credible. Keep a journal or notebook of your decisions during the analysis process to help others follow your reasoning. Document your reasons for the focus you take, the category labels you create, revisions to categories you make, and any observations you note concerning the data as you work with the text.

People tend to see and read only what supports their interest or point of view. Everyone sees data through his or her own lens and filters. It is important to recognize and pay attention to this. The analysis process should be documented so that another person can see the decisions that you made, how you did the analysis, and how you arrived at the interpretations.

Involve others.

Getting feedback and input from others can help with both analysis and interpretation. You can involve others in the entire analysis process, or in any one of the steps. For example, several people or one other person might review the data independently to identify themes and categories. Then you can compare categories and resolve any discrepancies in meaning.

You can also work with others in picking out important lessons once cutting and sorting is done. Or you can involve others in the entire analysis process, reviewing and discussing the data and their meaning, arriving at major conclusions, and presenting the results.

Involving others may take more time, but often results in a better analysis and greater ownership of the results.

Pitfalls to avoid

Finally, with any qualitative analysis, keep in mind the following cautions.

Avoid generalizing.

The goal of qualitative work is not to generalize across a population. Rather, a qualitative approach seeks to provide understanding from the respondent's perspective. It tries to answer the questions: "What is unique about this individual, group, situation or issue? Why?"

Even when you include an open-ended question on a survey, you are seeking insight, differences, the individual's own perspective and meaning. The focus is on the individual's own or unique response.

Narrative data provide for clarification, understanding and explanation — not for generalizing.

Choose quotes carefully.

While using quotes can lend valuable support to data interpretation, often quotes are used that only directly support the argument or illustrate success. This can lead to using people's words out of context or editing quotes to exemplify a point.

When putting together your final report, think about the purpose for including quotes. Do you want to show the differences in people's comments, give examples of a typical response relative to a certain topic, highlight success? In any event, specify why you chose the selected quotes. Include enough of the text to allow the reader to decide what the respondent is trying to convey.

Confidentiality and anonymity are also concerns when using quotes. Even if you do not give the person's identity, others may be able to tell who made the remark. Consider what might be the consequences of including certain quotes. Are they important to the analysis and interpretation? Do they provide a balanced viewpoint?

Get people's permission to use their words. Check with others about the usefulness and value of the quotes you select to include.

Address limitations and alternatives.

Every study has limitations. Presenting the problems or limitations you had while collecting and analyzing the data helps others better understand how you arrived at your conclusions.

Similarly, it is important to address possible alternative explanations. What else might explain the results? Show how the evidence supports your interpretation.

Concluding comments

Working with qualitative data is a rich and enlightening experience. The more you practice, the easier and more rewarding it will become. As both a science and an art, it involves critical, analytical thinking and creative, innovative perspectives (Patton, 1990).

Be thoughtful, and enjoy.

References

- CDC EZ-Text. Centers for Disease Control and Prevention, National Center for HIV, STD, and TB Prevention Divisions of HIV/AIDS Prevention, Behavioral Intervention Research Branch. Retrieved 4-9-03: <http://www.cdc.gov/hiv/software/ez-text.htm>
- Krueger, Richard A. 1998. *Analyzing and Reporting Focus Group Results*. Focus Group Kit 6. Thousand Oaks, Calif.: Sage Publications.
- Krueger, Richard A. 1988. *Focus Groups: A Practical Guide for Applied Research*. Newbury Park, Calif.: Sage Publications.
- Miles, Matthew B., & A. Michael Huberman. 1994. *Qualitative Data Analysis: An Expanded Sourcebook*. Second Edition. Thousand Oaks, Calif.: Sage Publications.
- Patton, Michael Q. 1990. *Qualitative Evaluation and Research Methods*. 2nd Edition. Newbury Park, Calif.: Sage Publications.
- Pope, Catherine, Sue Ziebland & Nicholas Mays. 1999. *Qualitative Research in Health Care*. Second Edition. London: BMJ Publishing Group. Chapter 8. Analysing Qualitative Data. Retrieved 4-9-03: <http://www.bmjpub.com/qrhc/chapter8.html>
- Ratcliff, Donald. 2002. *Qualitative Research*. Part Five: Data Analysis. Retrieved 4-9-03: <http://www.don.ratcliff.net/qual/expq5.html>
- Santos, J. Reynaldo A., Diann Mitchell & Paul Pope. 1999. Are Open-Ended Questions Tying You in Knots? *Journal of Extension*. 37:4. Retrieved 4-9-03: <http://www.joe.org/joe/1999august/iw2.html>

Resources

This publication is one in a series of program evaluation guides designed to help extension educators better plan and implement credible and useful evaluations. These also may be useful to agencies or funders seeking realistic evaluation strategies.

These practical how-to evaluation publications are available on the UW-Extension Program Development and Evaluation web site:

www.uwex.edu/ces/pdande

This web site also houses *Quick Tips*, easy-to-use briefs for improving your evaluation practice. You can also find evaluation studies, instruments, workshop presentations, an evaluation curriculum and links to more resources. Maintained as part of the University of Wisconsin System, the web site is continually updated and improved.

Note: *Analyzing Qualitative Data* is a companion to *Analyzing Quantitative Data* G3658-6 in this series.

© 2003 by the Board of Regents of the University of Wisconsin System. Send inquiries about copyright permissions to Cooperative Extension Publishing Operations, 103 Extension Bldg., 432 N. Lake St., Madison, WI 53706.

Authors: Ellen Taylor-Powell, evaluation specialist, and Marcus Renner, research assistant, Program Development and Evaluation, University of Wisconsin-Extension.

Acknowledgements: This booklet is based on material initially written in 1999 and reviewed by Dick Krueger (University of Minnesota), Rey Santos (Texas A&M University) and Heather Boyd (University of Wisconsin-Extension). Thanks go to them for their early input that hopefully is reflected in this final product that has been ably edited by Rhonda Lee.

Produced by Cooperative Extension Publishing Operations

University of Wisconsin-Extension, U.S. Department of Agriculture and Wisconsin counties cooperating. UW-Extension provides equal opportunities in employment and programming, including Title IX and ADA. If you need this material in another format, contact the Office of Equal Opportunity and Diversity Programs or call Cooperative Extension Publishing Operations at (608) 262-2655.

Copies of this publication and others in this series are available from your Wisconsin county UW-Extension office or from Cooperative Extension Publications:

(877) 947-7827; Fax (414) 389-9130

<http://www1.uwex.edu/ces/pubs>

Analyzing Qualitative Data (G3658-12)

***UW*
Extension**

I-04-2003

Template A.

Phase 1 Notes: Initial
Considerations & Discussion

Template A. Phase 1 Notes- Initial Considerations & Discussion

Directions: This template is intended to be used as a high-level brainstorm to later inform the Engagement Strategy, timeline, and budget. It will allow staff to discuss engagement priorities, data or partnership needs, and potential trade-offs.

(A) After reviewing existing demographic information – what priority populations are within your project area? What priority populations might be most important to connect with during your project? (see step 1 in Framework)

(B) Assess and reflect on potential issues related to the project area and the priority populations that will be engaged. How might special considerations impact engagement with the priority population? (see step 2 in Framework)

(C) Assess and note existing County or staff relationships with partner organizations serving priority populations Important for your project/plan. Note if there are gaps – this may require additional funding or time to fill. (see step 4 in Framework)

(D) Discuss the level of engagement desired with key priority populations and partners. This will inform the budget and engagement strategy (see step 4 in framework)

(A) Priority Populations in geography*	(B) Special Considerations	(C) Partners with existing relationships & gaps/needs	(D) Desired level of engagement with partners**

*The team may also note subsets of priority populations important to connect with and note those separately in this column in order to think and plan for that group differently. For example, there may be generally a large proportion of Latine community in the study area but also a large farm worker community which may require a very different approach for engagement and have a different level of priority.

**This may depend on a number of factors and staff may now know this for sure at this point in the process. Options include: *Inform, Consult, Involve, Collaborate, and Empower*

Template B.

Phase 2: Engagement Plan Template

Community & Public Engagement Plan OUTLINE

Date:

Project/Plan:

Introduction

The engagement plan will guide community involvement during the _____ project. The engagement plan is to be a flexible guide for public and stakeholder engagement; the team may modify the plan as needed to improve public involvement.

Project Overview

The purpose of the PROJECT is to _____. Project Objectives include:

Underserved Populations Considerations

A goal of this public engagement approach is to engage the entire community, specifically underserved populations. Also to uncover potential issues, barriers, needs, and opportunities so the county can include solutions in the final _____. Information and engagement opportunities will be accessible, approachable, and inclusive.

Actions: Project staff will review and incorporate recommendations from the *Framework for Engagement and Decision-Making with Underserved Populations* for recommendations on engaging underserved and Title VI populations at every step of the planning and engagement process.

Title VI and Evaluation

Clackamas County policy is to involve the public in important decisions by providing for early, open, and continuous public participation in and access to key planning and project decision-making processes. The County recognizes that Title VI has been implemented to ensure decision-making processes are designed to prevent disproportionate adverse human health and environmental effects, including social and economic effects, as a result of any County project or activity on communities of color and low-income populations. Implementation of Title VI that can be incorporated into public involvement and communications efforts include:

- Engage existing community organizations or advocacy groups that work with or serve Title VI populations,
- Providing timely, accurate, and effective communications,

- Partner with nonprofits and established community groups, including those that assist minorities to conduct outreach,
- Ensure the planning process does not result in projects that have a disproportionate negative impact on Title VI populations,
- Advertise upcoming meetings in locations where Title VI populations live and work,
- Ensure advertisements are translated appropriately (into English, Spanish, and Russian) and indicate how people can participate,
- Host open houses in locations that are accessible and where the populations feel comfortable (i.e., non-governmental facility, community church, or online), and
- Include opportunities for Title II, Title VI, and EJ population input at stakeholder engagement meetings that are inclusive of key user groups within the community.

Transportation Planning Rule (OARS 660-12)

The Oregon Administrative Rules (OARs) include specific guidance in Chapter 660-012 which outlines the rules for Transportation Planning within the State of Oregon. OAR 660-012-0120 provides guidance on how planning engagement should be done and includes specific actions that need to be taken so that public engagement and decision making is consistent with statewide planning goals. In addition, OAR 660-012-0130 outlines specific practices that are required to be followed so that there is increased emphasis on centering the voices of the underserved populations identified in OAR-012-0125.

Public Engagement/Outreach Purpose and Objectives

The purpose of an engagement plan is to share information, gather input regarding the needs and issues of the public, stakeholders, and interested parties, and empower community to have a role in deciding how their community changes and grows. At a minimum, the public engagement goals include:

- Communicate complete, accurate, understandable and timely information about the project to the public.
- Engage a wide range of stakeholders in all aspects of the planning process.
- Provide meaningful public involvement opportunities and demonstrate how input has influenced the process by soliciting and recording comments, concerns and suggestions, and addressing and/or responding to concerns.
- Seek participation from underserved groups, including culturally diverse stakeholders, those with disabilities, mobility-challenged, low-income, limited English proficiency, minority and other underserved groups in the project area.
- Use a variety of strategies, including traditional and electronic media, to engage residents and the business community, including those who are not usually able to participate in policy discussions for economic, demographic, and/or cultural reasons.

- Ensure that the public involvement process is consistent with applicable state and federal laws and requirements, and is sensitive to local policies, goals, and objectives.
- Ensure that advisory bodies established for the planning process have adequate and timely opportunities to review and comment on draft plan elements.

Project Messaging & Key Talking Points

Are there considerations around messaging?

What:

Why:

Timeliness:

Outcomes:

Note: Consider how these core messages might need to be adapted for specific underserved populations.

Key Audiences & Stakeholders

The engagement effort seeks participation of all interested individuals, communities, and organizations. The public and stakeholder involvement process will seek to engage the following individuals and groups. Note that this is not meant as an inclusive list, review the *Framework for Engagement and Decision-Making with Underserved Populations* for recommendations on identifying priority populations.

Youth

- ☐ Youth Action Board
- ☐ Middle and high school clubs and groups

Community members and residents

- ☐ All county residents, including-disadvantaged, equity groups
- ☐ Traveling public
- ☐ Representative of Title VI communities
- ☐ Priority populations
- ☐ Community-based organizations

Current active transportation users

- ☐ Bicyclists
- ☐ Pedestrians
- ☐ Transit riders
- ☐ People with mobility impairments

Community and business leaders

- ☐ CPOs, Hamlets
- ☐ Chambers of commerce

- ☐ County advisory boards and commissions
- ☐ Other business groups
- ☐ Faith-based leaders
- ☐ Priority population leadership

Transportation advocacy groups

- ☐ Clackamas County Pedestrian-Bicycle Advisory Committee
- ☐ Bike Milwaukie
- ☐ Street Trust
- ☐ Canby Bike Advisory Committee

Elected officials

- ☐ Board of County Commissioners
- ☐ Metro
- ☐ Regional and state legislators

And others as deemed appropriate by the County or invited by the County to participate in individual meetings when certain expertise is required or at particular times throughout the Project.

Engagement Tools and Tactics

This engagement plan will employ a combination of traditional and virtual public engagement tools to reach out to and address the needs of residents and stakeholders of all backgrounds. The public and stakeholders will be engaged in a variety of ways, including through a website, printed materials (such as postcards, flyers and media releases), open houses (in person and/or virtual), on-line mapping exercise, presentations to community groups, and Project Advisory Committee meetings. **Note:** Review the *Framework for Engagement and Decision-Making with Underserved Populations* for recommendations on engaging underserved and Title VI populations.

1) Early Outreach and Meetings with Key Stakeholder Groups and Individuals		
Activity Tool	Timeframe Notes	Lead
Advisory Committee		
Community Planning Organizations (CPO's) and Hamlets		
Community-Based Organizations (CBO's)		
Stakeholder Interviews		
Focus Groups		
County Department collaboration		
Factsheet and FAQ sheet		
Website updates		

Interested Parties List/emails		
Public Comment Log		
2) Tabling or Community events		
Activity or Tool	Timeframe Notes	Lead
3) Priority Population Specific Outreach and Engagement		
Activity or Tool	Timeframe Notes	Lead
Community partner-hosted event(s)		
Mini event/ pop-up event(s)		
Focus groups		
Leadership/Advisory Committee		
Interactive, play-based workshop/activity		
3) Broad Outreach and Engagement		
Activity or Tool		
Public Engagement Milestone #1 – Community Event		
Public Engagement Milestone #2 – Virtual Survey		
Public Engagement Milestone #3 – Community Event		
Strategy for Community Events – Implement a robust outreach campaign to encourage as interested parties to participate, including:		

<p>#MyClackCo</p> <p>E-mail to interested parties (two weeks prior to each open house and other updates)</p> <p>Postings to social media sites such as Next Door, Facebook and Twitter</p> <p>Post flyers at locations where community members gather – library, county bldgs., etc.</p> <p>Partnership with local community and business groups to encourage them to share information through email blasts, newsletters, online calendars, or social media platforms</p> <p>News releases prior to each public outreach event</p> <p>Key project information translated into Spanish and posted on the project webpage</p> <p>Project website regularly updated</p> <p>Monthly E-newsletter</p>		
Meetings with key groups		
Agency Partner Workshop		
Postcards for Public Hearing		
Planning Commission Public Hearing		
Board of Commissioners Public Hearing		

ASSESSING PROGRESS - PERFORMANCE MEASURES

The project team will evaluate the public involvement process on an ongoing basis to determine the effectiveness of outreach tools and this engagement plan may be modified as needed to support project success.

The team may use the following **quantitative measures** to monitor overall engagement progress:

- Number of participants attending meetings or events.
- Number of unsolicited questions or comments received after information distribution, i.e., email blasts or postcard mailings.
- Number of website visits occurring during the life of the project.
- Number of people who have signed up for the project mailing list.
- Number of project comments received (phone, email, comment cards, online).
- Number of media mentions and articles that discuss the project.

The team should use the following **quantitative measures** to monitor progress engaging priority populations as listed in the *Framework for Engagement and Decision-Making with Underserved Populations*:

- Demographics of those who participated in engagement activities/events equivalent to county demographics listed in the Community Profile (for those who choose to report)?
- Participants of advisory and decision-making bodies is equivalent to county demographics.
- % of public activities/events where non- English speakers may be present offered language interpretation.
- % of community partners who received resources for engagement, who attend the final adoption of the TSP and/or offered testimony in support of final TSP.
- At least 20% of total events/activities were non-traditional* engagement opportunities that physically met priority populations where they were at. (*non-traditional means any event that was not a government-led meeting or open house (virtual or in-person) that connected project staff and community members. i.e. CBO- hosted, fairs, faith-based locations, sharing a meal with community in their space, schools, etc.)
- Response rate from community partners Clackamas County staff have relationships with. (Response means that the community partner returns contact or ask by staff to participate in some way in the TSP, e.g. sharing information, hosting an event, etc. Even if a response is a “no”, responding demonstrates trust and helps track the strength of county relationships)
- Number of new-to-government community leaders and/or community partners serving priority populations who supported engagement (information sharing, co-hosting event, offering space at existing event, other)
- % of 12 priority populations (sub-groups) reached through support from a community leader and/or community partner.

- What % of engagement resources were provided for non-traditional events vs. traditional activities?
- What % of overall engagement resources went to community/community-based organization contracts or stipends vs consultant vs county staff time?

The effectiveness of the public involvement process may also be determined based on **qualitative assessments** of the following questions:

- *Quality of outcomes:* Were public concerns addressed? If appropriate, did the process change based on new information or public concerns?
- *Legitimacy of process:* Were communications consistent and open? Did participants accept the outcomes even if they did not agree with them?
- *Improved future capacity:* Did participants become better informed about relevant project issues and the concerns of other stakeholders? Did the project team and the public learn from the process to improve future efforts?
- *Alignment with scope:* Did our engagement scope cover the needs, wants, and issues brought up by the community?

The team should use the following **qualitative measures** to monitor progress engaging priority populations as listed in the *Framework for Engagement and Decision-Making with Underserved Populations*:

- What opportunities were created for priority populations, specifically, to influence the outcome of the project in addition to opportunities that were available to the general public.
- Did majority of priority population participants feel their concerns and feedback will be taken seriously by DTD. (Tool: Bean Jars/quick survey as participant is leaving event with scale 1-3 for the following question(s) “How likely do you feel the County will incorporate your concerns and ideas into the project” or “How likely to do feel the County will take your feedback seriously?” or “How was your experience”)
- What actions or special considerations did staff take to be responsive to the community context for this project.
- Did the project pivot to address a challenge or issue that came up throughout the process?

Template C.

Phase 3 Notes: Wrap-up &
Reflection

Template C: Phase 3 Notes: Wrap-up & Reflection

Step 1: *Select a Tool to Use for General Reflection of the Engagement Process and Walk through Tool and Questions with Project Team* (Templates provided at end of this document)

- Plus/Delta chart
- Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Consider the following general reflective questions:

- What worked well?
- If we tried something new, how did it go?
- What didn't work? What could have been done differently?
- Did anything come up that wasn't expected? Were we able to adapt mid-process to accommodate those changes? What did we learn?
- Were resources allocations appropriate?
- Where were our pain points?
- What would we do again/ replicate in future engagement efforts?
- How did we track our performance measures? Is there anything we would do differently?

Step 2: *Review and Answer Qualitative Performance Measure for long-term tracking of progress.*

1. **Qualitative:** What actions or special consideration did you take to be responsive to the community context for this project. (insert the special circumstance and how the engagement strategy responded)

2. **Qualitative:** Did the project pivot to address a challenge or issue that came up throughout the process? (*Tool: Reflective Questionnaire*)



3. **Qualitative:** What opportunities were created for priority populations to influence the outcome of the project in addition to opportunities that were available to the general public. (*Tool: Reflective Questionnaire*)

Step 3: Save and Share Reflections to Improve future Engagement

Save word document as new file with project name and save in shared folder for other staff to review and learn from.

Add Qualitative performance measures to other engagement performance measures and save appropriately.

Plus/Delta Chart:

<div data-bbox="467 262 532 331"></div> <div data-bbox="352 338 649 375">Things that went well</div>	<div data-bbox="1089 262 1159 344"></div> <div data-bbox="993 344 1247 382">Things to Change</div>

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

Strengths	Weaknesses
Opportunities	Threats