

BEFORE THE METRO COUNCIL

FOR THE PURPOSE OF ADOPTING THE) RESOLUTION NO 99-2848
METRO COMMUNICATIONS PLAN)
FOR FISCAL YEAR 1999-2000 AND) Introduced by Presiding Officer Monroe and
APPROVING THE EXPENDITURE OF) Executive Officer Burton
FUNDS NECESSARY FOR THE)
IMPLEMENTATION OF THE PLAN)

WHEREAS, the Executive Officer has reorganized department staff resulting in the creation of a new central communications team; and

WHEREAS, the adopted FY 1999-2000 Metro budget allocates \$75,000 for the general support of the communications and outreach efforts of this team; and

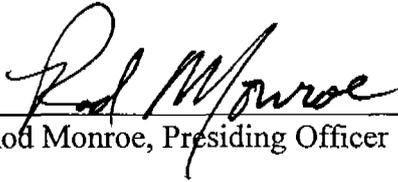
WHEREAS, Budget note 1 in the adopted FY 1999-2000 Metro budget directs that the Metro Council adopt a communications plan relating to the operation of the communications team prior to the expenditure of the \$75,000; and

WHEREAS, A communications plan, titled "A Strategic Three-Year Communication Plan for Metro" has been submitted by Metro's Executive Communications Team, as shown in Exhibit A; now, therefore,

BE IT RESOLVED:

That the Metro Council adopts the Metro Communication Plan, attached as exhibit A, for fiscal year 1999-2000, and approves the expenditure of \$75,000 as identified in the Plan, to implement its objectives.

ADOPTED by the Metro Council this 7th day of OCTOBER 1999.



Rod Monroe, Presiding Officer

APPROVED AS TO FORM:



Daniel B. Cooper, General Counsel

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Metro Plan



METRO
Regional Services
*Creating livable
communities*

99-02

*Planning
that
protects the
nature of
our region*



**A Strategic
Three-Year
Communications
Plan for Metro**

*Proposed
Oct. 7, 1999*

Exhibit A

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Metro – planning that protects the nature of our region

Strategic three-year communications plan

Executive summary

The goal of the communications plan is to increase awareness and understanding of Metro’s role and regional planning mission. Recent research shows that residents of this region generally are aware of Metro’s land-use and transportation planning responsibilities. And while residents say that open spaces, streams, farmland and forests make this region livable, they do not seem to be aware of Metro’s specific efforts to protect these natural resources. It also does not seem clear that they understand that there is a connection between careful urban planning and the health of the natural environment. During the next three years, the best way to accomplish this plan’s communications goal is to link Metro’s regional planning role to its policies, programs and services that protect the environment.

Making that connection requires leveraging available outreach resources to carry out a consistent and comprehensive communications effort. Every visible aspect of Metro must be used to convey key agency themes while still meeting department goals.

The communications plan calls for increasing the impact of Metro’s existing activities, events and communications tools that effectively illustrate the link between regional planning and protecting the environment. Examples include the Salmon Festival, GreenScene, salmon recovery, statewide land-use Goal 5 fish and wildlife habitat protection, open spaces acquisition, recycling and household hazardous waste collection events and the Green Streets transportation handbook. These efforts will be ongoing throughout the three-year plan. New programs and opportunities will be folded in as they arise.

Communications priorities for year 1 of the plan focus on enhancing regional partnerships, particularly with local jurisdictions, and developing a sustained, integrated “inreach” effort to Metro employees. Support from this foundation of core Metro audiences must be solidified before moving toward the larger, more ambitious communications objectives.

The agency will engage in a dynamic series of discussions with city and county representatives to increase opportunities for information sharing and constructive dialogue.

Particular emphasis will be placed on tools that illustrate the “why and how” of Metro operations and previous planning decisions.

Employees will be involved in all levels of communications projects in order to build ownership and support for agency outreach efforts. Internet tools such as a linked calendar of events, enhanced Regional Directory and expanded intranet resources (for internal use) will support these priorities.

In years 2 and 3, the communications plan will emphasize the public at large through completion of the new agency visual identity and tagline and an extensive regionwide outreach effort to re-engage the public in planning that protects the urban and natural environment. On-line community forum capacity and other interactive features will be added to the Metro web site. Internal and inter-jurisdiction communication will continue to advance through cross-departmental work groups and other information-sharing efforts.

The people and the environment of this region distinguish it from any other place. By connecting Metro’s regional planning decisions and services to the environmental values that shape our collective sense of identity – the beliefs that led to those decisions and services in the first place – we are simply returning to our roots.

Introduction

It's better to plan for growth than ignore it.

Planning is Metro's top job. Metro is a regional forum where cities, counties and citizens can resolve issues related to growth – things like protecting streams and open spaces, transportation and land-use choices and increasing the region's recycling efforts. Open spaces, salmon runs and forests don't stop at city limits or county lines. Planning ahead supports livable communities now and protects the nature of our region for the future.

Metro – protecting the nature of our region.

What if more people understood what Metro does? Would more of them be engaged in the regional public policy process? Would the number of volunteers involved in Metro's programs increase? Would more people make environmentally sound decisions in their own lives?

Recent research (Moore 1999) shows that the public is generally aware of Metro's planning responsibilities. It also shows that Metro's efforts to protect open spaces, streams, farmland and forests are least familiar. Yet these activities are high on the public's list of what contributes to livability. As the region continues to deal with growth, carefully integrated land-use, transportation and environmental planning will protect the character of our neighborhoods, increase transportation choices and support communities that meet the needs of both people and wildlife. Increased awareness of Metro's efforts in these areas can help residents link Metro's regional planning mission to livability. Research shows that residents equate planning with protecting livability and the environment – *if* the connection is made clear for them.

The overall goal of the communications program is to increase awareness and understanding of Metro's role and regional planning mission. During the next three years, the best way to accomplish this is to link Metro's planning role to what it is already doing – via its policies, programs and services – to protect the environment.

Making that connection requires leveraging available outreach resources to carry out a **consistent and comprehensive communications effort**. Every visible aspect of Metro must be used to convey primary and secondary messages – while still meeting department goals and objectives.

Communications plan goal

Increase public awareness and understanding of Metro's role, mission and programs.

Objectives

- Objective 1 Link Metro's planning role to protecting the urban and natural environment.
- Objective 2 Develop a sustained, integrated "inreach" effort to engage Metro employees in understanding and becoming advocates for Metro's environmental planning role *and* for understanding the importance of the role they play within the organization.
- Objective 3 Enhance regional partnerships.
- Objective 4 Maximize and streamline core communications programs.

Performance measures

How do we know these objectives have been met?

- Objective 1 A year-3 survey shows that 1 in 7 people link Metro with "green" issues. In the baseline 1999 Moore survey, 1 in 14 people surveyed made that connection.
- Objective 2 A survey conducted at the end of year-2 shows a 25 percent increase in employee awareness of Metro's programs, services, mission and message. The year-1 employee survey will serve as the baseline.
- Objective 3 100 percent of year-1 tools are developed and new programs implemented.
- Objective 4 Priorities are achieved and core communications programs are maximized:
- Coordinated speaker's bureau is implemented.
 - Master calendar is developed and formal speaking engagements by staff are coordinated and recorded.
 - Web site improvements increase traffic to Metro's web site by one-third.

Message development and testing

Primary message development is based on research (Moore 1999 and Davis and Hibbits 1997). Secondary messages are tailored to key audiences and will vary according to audience and communications mechanism, but primary messages must remain consistent on all fronts. The following suggested messages will be developed and tested further with input from Metro's internal and external audiences.

Primary message components

- It is better to plan for growth than ignore it.
- Planning means protecting our urban and natural environment – neighborhoods and communities as well as open spaces, streams, farmland and forests.
- Planning that protects the nature of the region.

Secondary messages by key audiences

1. Government/regional partners

- Metro is a forum where cities and counties work together to discuss common issues and set regional standards and goals.
- Regional plans include flexibility for local governments and communities.
- Local jurisdictions are part of the process.

2. Employees and volunteers

- You are an ambassador for Metro. Learn about Metro. Talk to your community and neighbors.
- Your voice and actions matter; you are a valued part of the organization.

3. Business and industry

- You are a valued part of making our regional economy work.
- A regional approach to planning makes good economic sense.
- Being green is good business

4. Environmentalists

- Metro is your partner in protecting open spaces and habitat for fish, wildlife and people.
- Metro's public policy process is where your voice will be heard.

5. Newcomers

- Metro, the nation's only elected regional government, is a reason "things look different here."
- Metro protects the things that make this region a good place to live.
- Get to know us. Here's what we do

6. Families with children

- Stewardship today protects this place for tomorrow.
- Metro's Oregon Zoo and regional parks: protecting habitat for us all.

7. 18 to 34-year-olds

- Work with Metro to protect the environment. Be part of the solution. Check out Metro's web site, volunteer at an open space work party, etc.
- Metro wants to know what you think.

8. Late boomers/early seniors

- Metro is helping preserve what we value most about our communities.
- Almost half a million more people will be living in this region by the year 2017. One-half will be our own children and grandchildren.

1.

Link Metro's planning role to protecting the environment

Objective 1: Link Metro's planning role to protecting the environment

Target audience: All Metro audiences (see page 4)

Strategy 1: Integrate public outreach

Develop a sustained, integrated outreach effort to engage the public. [Ongoing]

Tactic 1: Identify Metro services, activities and events (see below) that demonstrate the strongest links between planning and protecting the environment and coordinate department efforts. [Years 1-3]

<p>Fall '99</p> <p>Salmon Festival – Regional Parks and Greenspaces, Executive Office, Growth Management Services, Transportation and Regional Environmental Management</p> <p>Hazardous waste collection events – Regional Environmental Management</p> <p>Natural gardening workshops – Regional Environmental Management</p> <p>Environmental education grants – Metro Regional Parks and Greenspaces</p> <p>Waste reduction school grants – Regional Environmental Management</p> <p>Salmon recovery efforts – Regional Parks and Greenspaces, Executive Office, Growth Management Services</p> <p>Infill and redevelopment media stories</p> <p>Regional transportation plan adoption process – Transportation and Metro Council Green Streets document development – Transportation</p> <p>Local government trainings on Title 3 – Growth Management Services</p> <p>Open spaces acquisitions – Regional Parks and Greenspaces</p> <p>Regional recycling information campaign – Regional Environmental Management</p> <p>Winter '99-00</p> <p>Goal 5 open houses on riparian protection strategies and council adoption process – Growth Management Services and Metro Council</p> <p>Natural Areas Protection Plan public outreach on definition of “regional natural areas” – Regional Parks and Greenspaces</p> <p>Culvert identification project – Regional Parks and Greenspaces and Transportation</p>	<p>Distribution of Green Streets document – Transportation</p> <p>Regional recycling advertising campaign – Regional Environmental Management</p> <p>Open spaces acquisitions – Regional Parks and Greenspaces</p> <p>Spring '00</p> <p>Joint public outreach effort on Goal 5 Uplands ESEE process and Natural Areas Protection Plan – Growth Management Services and Regional Parks and Greenspaces</p> <p>Recycling/hazardous waste reduction outreach efforts – Regional Environmental Management</p> <p>Salmon recovery efforts – Regional Parks and Greenspaces, Executive Office, Growth Management Services</p> <p>Open spaces acquisition fifth anniversary – Regional Parks and Greenspaces</p> <p>Natural gardening workshop – Regional Environmental Management</p> <p>Metro involvement in Earth Day 2000 – all departments</p> <p>Summer '00</p> <p>Goal 5 uplands adoption process – Metro Council and Growth Management Services</p> <p>Natural Areas Protection Plan policy discussion – Regional Parks and Greenspaces</p> <p>Kick-off planning Tualatin River access points – Regional Parks and Greenspaces</p> <p>Lawn and garden waste reduction efforts – Regional Environmental Management</p> <p>Natural gardening event – Regional Environmental Management</p>
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Step 1: Develop agency promolink calendar of these high-priority programs, services and events. [Year 1]

- Work with departments to ensure timing of these efforts are coordinated, creating a multiphase, ongoing effort.

Step 2: Develop individual communications plans for targeted efforts listed on this calendar. [Ongoing] These plans will:

- Increase number of people reached.
- Generate positive media coverage (see Appendix 1).
- Increase promotional opportunities.
- Increase appeal to target audience.
- Link program, service or event to Metro.

Step 3: Generate additional resources such as media and financial sponsors to assist with carrying out plans. [Ongoing]

Tactic 2: Develop multimedia, regionwide effort to reengage public in 2040 (planning that protects the environment) and illustrate the heart and soul of Metro’s mission. One part of effort may be to recognize 2040-on-the-ground projects that meet regional guide lines – e.g., “True to the nature of our region” signs or displays. [Years 1-2]

Step 1: Create an interim work team to develop immediate and long-term action plan. Explore opportunities to leverage tools such as targeted newsletters and speaking engagements.

- speaker’s bureau
- local partner outreach efforts

Step 2: Research funding possibilities. [Year 1]

Step 3: Develop proposals, grant requests, etc. [Year 1]

Step 4: Design outreach campaign. [Years 2-3]

Step 5: Work with partners to implement. [Year 2]

Tactic 3: Upgrade and expand current effective communications tools for better linkage, in addition to promolink calendar, activities and programs. [Years 1-2]

Step 1: Expand Park’s GreenScene’s scope, distribution and financial support. [Years 1-2]

- Use current “Friends of Metro” list.
- Add natural gardening and recycling names.
- Research demographics. Strategically mail to targeted audience, with response card.
- Add distribution sites.
- Include in green welcome packet for newcomers.

- Recruit sponsor such as GI Joe’s to help underwrite.

Step 2: Expand distribution of REM’s green welcome packet, create stronger link to Metro. Obtain private financial support if necessary. [Year 1]

Step 3: Link hazardous waste event and program advertising closer to Metro. [Year 1]

Tactic 4: Develop new communications approaches that link to Metro’s “green” message. [Years 1-2]

Step 1: Sponsor the environmental section of CascadeLink (www.cascadelink.org), a regional web site maintained by the Multnomah County Library. (This is an example of an inter-jurisdictional project in the community.) [Year 1]

- Provide content and assist with development. Metro staff will assist with the development of this section, as an inter-jurisdictional project in the community.
- Create link from Metro web site.
- Establish link from Cascade Link to information about Metro environmental issues on Metro’s web site.

Step 2: Create, with government partners, a web site or web pages designed as a central source of public information for residents in the region about the endangered species act (ESA) listing. [Year 1]

- Invite local government partners to respond to the listing by participating in this collaborative public information project.
- Research feasibility of developing web page and other potential collaborative projects.
- Highlight local and collective responses to listing.

Step 3: Participate in the Oregon Public Broadcasting Creating Community Through Media project for public affairs pilot on regional transportation and land-use planning issues. [Years 1-2]

- Provide staff support during research phase of project, including assistance with focus groups and identifying the best model to ensure long-term financing and leveraging links to other media.
- Secure intergovernmental funding agreements.
- Work with Metro’s Transportation Department to update Unified Work Program to authorize expenditure of \$100,000 federal transportation grant.
- Work with project work team and advisory committee to further inclusion of Metro information and messages in pilot and to select production team.
- Research methods to leverage Metro’s visibility and link project to “green” message.
- Develop request for proposals for video pilot, based on research.
- Partner with Oregon Public Broadcasting to manage pilot contract.
- Leverage promotion of pilot via Metro web page and any planned Transportation and Growth Management publications or mailings in fall 2000.

Tactic 5: Create new “green” visual identity and tagline to tie together priority programs, services, events and tools. [Years 1- 2]

Step 1: Build on recent external survey research to create ideas and varied treatments.

- Conduct internal key influencer research to determine values that best describe Metro.
- Develop one-page creative brief.
- Create possible taglines from brief.

Step 2: Test internally and externally. Determine best choice and implement.

Step 3: Merge with design standards process.

Develop a sustained, integrated “inreach” effort to engage Metro employees

Objective 2: Develop a sustained, integrated “inreach” effort to engage Metro employees in understanding and becoming advocates for Metro’s environmental planning role and for understanding the importance of the role they play within the organization.

Target audience: All employees (staff at Metro Regional Center and off-site – zoo, transfer stations, household hazardous waste facilities, parks and MERC facilities)

Strategy 1: Survey employees

Survey Metro employees to determine how they perceive Metro and their role in the organization. What motivates us? Why do we work here? What are our values? (Information will also be used to develop message and tagline.)

Tactic 1: Hire consultant to conduct in-depth, internal interview survey of influential Metro employees, with focus on values. [Year 1]

Step 1: Identify key influencers.

Step 2: Draft request for proposals for consultant

Tactic 2: Conduct follow-up to the 1997 employee survey to measure changes and gather information to broaden and balance perceptions offered by the survey of key influencers and report results to employees at all-staff meeting. [Year 1]

Tactic 3: Conduct another employee survey at the end of year 2 to measure increases in employee awareness or Metro’s programs, services, mission and messages. [Year 2]

Strategy 2: Develop Metro message

Promote understanding and ownership of the Metro message by engaging employees in the development of outreach tools for the public.

Tactic 1: Identify and engage key employee groups including the Metro Council, department directors, division and program managers and supervisors, public involvement and marketing staff, planners and front-line employees – employees who have the most contact with the public – parks, transfer station, household hazardous waste facilities, zoo, receptionists, etc. [Ongoing]

Tactic 2: Develop and conduct “Communications Works” presentations with key

groups. Tailor agendas to key groups, introduce Executive Communications Group, test messages and design approaches, brainstorm opportunities for connecting program goals to overall Metro message and streamline work processes. [Year 1]

Step 1: Create a communicator kit listing resources, key contacts and providing sample publications. Post on internal web site and provide paper reference folder to support presentations.

Step 2: Schedule condensed “Communications Works” presentations to division workgroups.

Strategy 3: Launch on-line employee resources

Launch and promote use of internal Metro web site to provide employees with easy-to-access on-line resources and information (See Appendix 2).

Tactic 1: Make intranet more accessible and fully used by all employees. [Year 1]

Step 1: Rename intranet to reinforce primary message and provide clue to content. Develop contest to have employees rename the intranet.

Step 2: Promote intranet and unveil the new name at an intranet kick-off celebration. Generate excitement with give-aways that promote use of the intranet (e.g., t-shirts, mousepads, magnets, pencils).

Step 3: Make the intranet the home page for every employee’s internet access.

Tactic 2: Promote the new communications tools defined in this plan as they go live by featuring them on-line, with e-mail and/or a promotional item. Examples of specific intranet tools include the consolidated mailing list, master calendar and new slide show. [Ongoing]

Tactic 3: Support Human Resources and Administrative Services efforts to provide information of vital interest to all employees. Information would include a staff directory, benefits information and on-line computer help.

Strategy 4: Establish reliable communications methods

Establish regular, reliable methods of communicating to employees that are easily accessible to everyone, particularly employees at remote sites.

Tactic 1: Hold all-staff meetings on a regular basis. [Year 1]

Step 1: Set up yearly calendar for all-staff meetings.

Step 2: Weave in primary messages.

Tactic 2: Distribute regular Monday morning e-mail/paper trail (for bulletin boards and those who don't have computers) message from the executive office. Include important policy issues and Council decisions of the week, events, what we might see in the newspaper, etc. [Year 1]

Tactic 3: Create “question of the week” educational opportunities for all employees. Send e-mail or include page on intranet posing questions about a specific program or issue, with a link to relevant portion of Metro’s web site where answers may be found.

Tactic 4: Create one central place to display and distribute all Metro publications and weekly communications so they are easily available to employees. [Year 1]

Step 1: Locate display area and display.

Step 2: Assign staff to keep display stocked at all times.

Tactic 5: Hold an annual “True to Our Nature” fair for all staff to showcase work to each other. [Year 2]

Tactic 6: Hold an annual “meet-your-fellow-employee-day” where everyone wears name tags, include progressive snack event through department or other similar event; could be coordinated through partnership with the employee association in conjunction with an annual barbecue or holiday event. [Year 2]

Tactic 7: Develop a HAT (Here’s a Thought) rack – a bulletin board that provides an ongoing way for employees to post questions and provide feedback or suggestions and ensures response from managers. [Year 2]

Tactic 8: Sponsor informal brown bag meetings for employees to listen to speakers, hear about travel adventures or brainstorm solutions to problems that cross departments. [Year 2]

Strategy 5: Support Human Resources efforts

Support and enhance Human Resources employee recognition and outreach efforts.

Tactic 1: Enhance the orientation program for new employees. [Year 1]

Step 1: Create a “True to Our Nature” welcome packet for new employees – include phone book, information about how to use Creative Services, 2040 history, computer information, recycling information, bike map, Administrative Services staff guide, how to log onto intranet pages, T-shirt and Metro Thanks card starter set, etc.

Step 2: Assist Benefits group in development of new “Planning that protects the nature of our region” video for employee orientation and other uses.

Tactic 2: Coordinate Metro 101 workshops for Human Resources. [Year 1]

Step 1: Revise lesson plan for Human Resources’ Metro 101 workshop. Incorporate materials produced for new employee orientation and new core Metro communications tools.

Step 2: Coordinate workshops offered in fall 1999 and spring 2000.

- Assign staff (trains the trainers).
- Organize presentation materials: slide show, intranet page projector and handouts.
- Conduct and evaluate workshops.

Tactic 3: Set up Metro employee recognition program. [Years 1-2]

Step 1: Audit existing employee recognition products and programs – certificates, Metro Thanks cards, service awards, etc. (Include MERC, zoo and department awards in audit.)

Step 2: Create awards program honoring successes that demonstrate Metro values.

- Identify values through survey noted in Objective 2, Strategy 1.
- Draft criteria for award, design nomination process and the award.
- Promote awards program.
- Present awards(s) at all-staff meeting or as part of the all-employee event.

Step 3: Design recognition products identified in the audit as a package that reinforce the primary Metro message and define a budget and implementation schedule.

Step 4: Showcase Metro employees and volunteers whose successes illustrate Metro values in external publications.

Strategy 6: Support Metro employee volunteer benefit

Support and cultivate shared Metro values and sense of community through a new Metro benefit supporting Metro employee participation in volunteer events that are “True to Our Nature.” (The 1996 floods set some precedent for this.)

Tactic 1: Research and develop proposal defining costs, benefits and opportunities. [Year 2]

Enhance regional partnerships

Objective 3: Enhance regional partnerships

Target audience: Metro-region mayors, city councilors, county commissioners, planning commission members, city managers, state and federal elected officials, schools, regional partner agencies (Tri-Met, Port of Portland), and special districts as well as Clark County and city of Vancouver elected officials

Strategy 1: Increase our understanding of our regional partner’s interests

Increase understanding of how Metro works. Clarify roles and responsibilities.

Tactic 1: Increase one-on-one communication between elected officials of the region. [Year 1]

Step 1: Survey each jurisdiction/partner in written form with follow-up phone calls to identify tools and resources that the elected officials need in relation to Metro’s programs/requirements.

Step 2: Create a Local Partner Kit that includes new tools (see Tactic 5, following), Partnership Matters and contact information for councilors, executive officer and auditor.

Step 3: Recruit opportunities for one-on-one contacts between Metro officials and jurisdictional partners.

- Use council and executive assistants to recruit one-on-one appointments and monitor issues with targeted officials on a weekly or monthly basis.

Step 4: Coordinate all appropriate activities with Metro’s legislative relations team.

Tactic 2: Work with targeted local jurisdictions, upon request, to organize informal, town hall-style meetings with consistent messages and participation from executive officer and councilors. [Years 1-3]

Step 1: Support the Metro Policy Advisory Committee (MPAC) outreach proposal by organizing council-sponsored facilitated joint meetings between the Metro Council and the 8 to 10 councils and commissions faced with the most difficult planning challenges. [Year 1]

Step 2: Carry out the MPAC outreach proposal by conducting a series of tailored meetings.

- Use survey developed by Council Outreach Office with local jurisdictions to identify priority issues and necessary tools. [Year 1]

- Develop/organize workshops. Discuss format and information needs with each jurisdiction. What works for them? Who is the audience – technical staff or policy-makers? [Years 1-2]
- Create easily understood program and communications tools to convey (in a simplified format):
 1. Region’s planning process: how it works, how it applies to you.
 2. What’s going on now: current issues and actions.
 3. What’s next: upcoming decisions, future options.
- Create implementation schedule: work with each targeted jurisdiction to determine logistics – time, date, place, etc. – and to promote workshop(s) to target audiences. [Year 2]
- Co-host meetings. Send invitations from MPAC, signed by chair and local elected official/host. Metro will provide staff as requested. [Years 2-3]
- Conduct workshops with local hosts. [Years 2-3]
- Ask participants how they would like to be kept informed, what information is useful, what assistance/tools, if any, do they need/want from Metro. What ventures can we partner with them on?
- Seek input on ways to improve communication between Metro and local jurisdictions and convey secondary messages.
- Follow-up after each workshop.
- Critique with local host – what was useful, etc.
- Update MPAC and Council regularly.

Tactic 3: Tailor specific strategies for using speaker’s bureau as an outreach tool with local government partners. [Ongoing]

Step 1: Send brochure with cover letter from executive officer and presiding officer to elected officials and targeted government staff (directors, managers).

Step 2: Emphasize that Metro is available to provide informational presentations on brochure topics and timely issues.

Step 3: Offer a quarterly speaker’s bureau hot issues flyer about timely issues related to the 2040 process and other agency programs.

Step 4: Work with Metro departments/council to establish list of local government partners to contact to set up presentations on specific issues.

Step 5: Conduct targeted follow-up phone calls to local partners, booking speaking engagements as possible.

Step 6: Track responses and engagements. Capture on master calendar. (See Appendix 2.)

Tactic 4: Create opportunities for and conduct inter-jurisdictional information sharing/debate on hot issues (e.g., ESA), using Metro as the forum. [Ongoing]

Tactic 5: Increase awareness of Metro’s committee structure and how each jurisdiction is represented or has a voice in Metro’s decision-making process. [Year 1]

Step 1: Develop and maintain lists for each city and county showing who represents the jurisdiction on Metro’s primary policy and technical advisory committees. (See Appendix 3.)

- Encourage Metro elected officials and staff to distribute these lists when meeting with local jurisdictions.

Step 2: Add pages to the committee information on Metro’s web site to provide a centralized access point for all committee rosters, bylaws, vacancy announcements, applications and other general information.

Step 3: Develop flowchart of primary Metro technical and policy advisory committees. Include basic function or mandate of each.

Tactic 6: Develop a series of tools to increase understanding of the roles and responsibilities of Metro and local jurisdictions. These tools would be included in the Partnerships Matters kit. [Year 1]

Step 1: Develop a one-page roles and responsibilities sheet.

Step 2: Create a 3-4 page written history of 2040, including background on how why and through whom it was adopted. Supplement presentations with script and oral testimonies.

- Place additional background information on Metro’s web site by building on information currently available in applicable department pages.
- Provide to all new elected officials, local staff, advisory committee members and volunteers. Present at new elected officials briefings.
- Add to speaker’s bureau menu and other Metro publications, as applicable.
- Encourage policy advisory committee chairs (MPAC, JPACT) to place on agenda and provide time for discussion and reengagement in the 2040 vision.

Step 3: Develop and maintain jurisdictional fact sheets with a total of all funding (grants, etc.) and in-kind assistance distributed by or through Metro. Include visual/graphic representation of aid received.

Tactic 7: Enhance targeted Metro publications. [Years 1-2]

Step 1: Enhance Regional Directory. [Years 1-2]

- Establish production timeline and budget to release directory early in 2000. [Year 1]
- Identify core agency information to add to Regional Directory as appendix, write to fit abbreviated format. [Year 1]
- Examine additional opportunities to use directory (e.g., fold directory into newly elected official briefings process as tool). [Year 1]
- Place directory on Metro web site. [Year 2]

Step 2: Evaluate Partnership Matters briefing book/production process and research additional distribution opportunities. [Year 1]

Tactic 8: Enhance newly elected official briefings. [Year 1]

Step 1: Review results of last three years of events (e.g., attendance, feedback from staff and participants, format).

Step 2: Use Council Outreach office survey to gather information on what local partners want from briefings.

Step 3: Convene cross-department team to create agenda, materials, organize sessions, logistics, etc.

Step 4: Produce briefings and capture feedback from participants on-site via written survey or end-of-meeting discussion.

Strategy 2: Promote collaborative projects and outreach

Promote collaborative communications projects and outreach with local partners (e.g., events, policy development, conferences, etc.).

Tactic 1: Partner on citizen trainings and other public outreach. [Year 2]

Step 1: Review/survey existing partnerships on outreach such as growth management’s land-use trainings.

Step 2: Create program with Council and participating departments to encourage outreach partnerships with local jurisdictions, regional, state and federal partners as well as non-government organizations.

Tactic 2: Partner on project signage (e.g., transportation improvement projects, trail development projects, Metro grant funded enhancement and habitat restoration projects, open spaces). [Year 2]

Step 1: Establish project work team with participating departments to set agency policy on Metro presence with other project partners on appropriate project signage.

Step 2: Research budget impacts to create and install project signage. Encourage departments to incorporate signage into all future project budgets.

Step 3: Support participating department outreach to prospective project partners to establish collaborative signage effort.

Step 4: Provide design guidelines for project signage to ensure appropriate agency/partner visibility.

Step 5: Establish tracking system/performance measures to evaluate success/needed adjustments to effort.

Strategy 3: Increase awareness of partnership accomplishments

Increase awareness of partnerships and the positive benefits provided.

Tactic 1: Review opportunities associated with Metro’s educational resources to promote partnerships with government agencies, schools and community education programs, nonprofits, natural resource organizations and businesses. [Years 1-2]

Step 1: Evaluate effectiveness of Metro’s Education Resource Fair as it pertains to outreach to and involvement of partners. [Year 1]

Step 2: Develop strategy to promote Metro’s success involving educational resources and associated partnerships. [Years 1-2]

Step 3: Research feasibility, cost and benefits of using MILT as an educational outreach tool, in conjunction with Metro’s curriculum program. [Year 1]

Tactic 2: Redesign current award system to recognize shared outreach and related partnerships. [Year 2]

Tactic 3: Incorporate partnership information into media relation activities and press communications tools. [Ongoing]

Step 1: Take local partners to local editorial meetings to discuss issues of shared interest.

Step 2: Include local partners as quote sources in media relations activities.

Step 3: Pitch partnership stories to local newspapers.

Step 4: Include partners in people-to-people media strategy.

Maximize and streamline core communications programs

Objective 4: Maximize and streamline core communications programs.

Target audience: All Metro audiences

Strategy 1: Implement speaker’s bureau

Implement coordinated speaker’s bureau program.

Tactic 1: Identify list of on-going Metro issues that can be used to develop a Metro slide show/script and a hot issues topic list (e.g., Title 3 implementation). Identify and train Metro speakers to give presentations around the region to civic and service organizations, Metro stakeholder groups and neighborhood associations. [Ongoing]

Step 1: Request issues and speakers lists from Metro departments.

Step 2: Revise Metro slide show/script, weaving into it agency’s key messages.

Step 3: Develop promotional brochure about speaker’s bureau program.

Step 4: Create comprehensive mailing list of existing organized groups.

Step 5: Distribute promotional brochure to comprehensive mailing list.

Step 6: Assist departments with targeted follow-up.

Step 7: Track responses and engagements. Capture on master calendar. (See Appendix 2.)

Strategy 2: Establish “green” communications standards

Use new visual identity and tagline as minimum communications standard for all communications tools. Ensure “green” message is conveyed in core communications tools.

Target audience: All Metro audiences

Tactic 1: Use communications products to illustrate message and design concepts. [Year 1]

Step 1: Design prototype communications products. Prototypes should address the Metro slide show, brochure, tabletop display, banners, bookmarks and other items.

Step 2: Implement approved design on core communications tools that support Metro’s primary messages.

- Metro web site

- Metro brochure
- Regional Directory
- Speaker’s bureau collateral
- Metro slide show
- Metro tabletop display
- Metro event kit banners and signs
- Awards
- Standard report covers
- Metro collateral material such as letterhead, forms, bookmarks and magnets

Step 3: Schedule brainstorming meetings with key department communications staff to discuss upgrades to communications tools and identify opportunities for visual and verbal links to the overall message.

Step 4: Revise Creative Service’s job request form to include question(s) about how the requested project will support the overall Metro message.

Step 5: Track/review departmental communications projects via Creative Services/liason activities to analyze for collaboration/streamline opportunities and evaluate implementation progress.

Tactic 2: Publicize and promote Metro identification standards and train employees on how to use them. [Years 1-2]

Step 1: Conduct e-mail and/or phone survey to determine who, outside of Creative Services, publishes Metro documents and the types of documents being produced. [Year 1]

Step 2: Create cross-department design team to meet on standards implementation and resource sharing. Establish regular meeting schedule or check-in procedure. [Year 1]

Step 3: Document and publish identification standards for publications and communications products. [Years 1-2]

- Create intranet identification standards resource page to distribute the logo and post information about editorial style and logo use. Create supporting tip sheet cards for Metro 101 and employee orientation workshops.

Step 4: Conduct series of identification standards discussion/training workshops targeted to the design team and groups identified as publishers. [Year 2]

Strategy 3: Support department communications goals

Coordinate and support communications goals of each department.

Target audience: Metro department staff, Metro Executive Office, Metro Council Office, Metro Auditor’s Office and Metro cabinet

Tactic 1: Strengthen liaison relationships between Executive Communications Group and senior communications staff from each department. (See Appendix 4.) [Year 1]

- Step 1:** Confirm Executive Communications Group assignments to each department.
- Step 2:** Establish monthly check-in with each department to ensure consistent communication.
- Step 3:** Convene Communications Advisory Group on as-needed basis to review/brainstorm new communications initiatives.
- Step 4:** Continue the current monthly Communications Team meetings.
- Step 5:** Issue annual progress report.
- Step 6:** Develop guest speaker brown bag series for communications staff to further cooperative efforts.

Tactic 2: Increase internal communication and coordination. [Years 1-3]

- Step 1:** Develop a system by which all formal speaking engagements, briefings or workshops conducted by staff are recorded. Include logistical information and post-meeting results. Capture on master calendar. (see Appendix 2). [Years 1-2]
 - Ensure that the information is readily accessible to all staff and elected officials and is used to convey consistent messages and information, flag hot issues and avoid duplicative efforts.
 - Conduct targeted training for all elected officials and applicable staff.
- Step 2:** Create and maintain a list identifying all Metro staff assigned to a specific jurisdiction or geographic area, both overall and for specific programs or projects. [Year 2]
 - Distribute list to all elected officials and applicable employees.
 - Use to facilitate cross-departmental coordination of staff working with similar areas or issues.
 - Place information on intranet. Could be contained in the electronic staff directory being developed.
- Step 3:** Implement daily (Monday-Friday) courier services to all Metro sites and facilities and keep current literature stocked at all sites and facilities. [Year 2]
- Step 4:** Explore creation of cross-departmental work groups. [Years 2-3]
 - Facilitate at least two meetings of staff assigned to similar geographic areas/ jurisdictions and capture feedback.
 - Explore possibility of continuing this system, using web-based tools as a

virtual forum and repository for area-specific information, including: hot topics, problems or issues encountered, message conveyed, feedback.

Tactic 3: Develop an extranet to share documents, reports, data and GIS information with local partners. [Years 2-3]

Step 1: Provide secure access to local governments and partner agencies to a dedicated portion of the web site on which draft documents and other information could be shared.

Step 2: Use chat software to develop discussion sites for specific issues, topics or groups (i.e., planners), but not open to the public at large.

Strategy 4: Implement integrated sign program

Implement an integrated sign program to identify, connect and increase visibility of Metro facilities and property.

Tactic 1: Provide signage for Metro facilities. [Years 1-2]

Step 1: Identify Metro facilities that need signage. [Year 1]

- Update visual survey with photographic documentation of priority Metro facilities/centers.
- Complete written report of audit noting level 1 recommendations that have been implemented since 1998 survey.
- Review level 2 recommendations with department stakeholders and draft priority list of level 2 projects to implement.

Step 2: Meet with department representatives to identify emerging projects requiring signage. Use these opportunities to enhance Metro's identification. [Year 1]

Step 3: Establish project work team including representatives of each affected department to serve as advisory board for facility identification plan. [Year 1]

Step 4: Draft scope of work and request for proposals for a master sign plan. The plan would provide specifications for a coordinated sign system for Metro facilities. Signs would clearly identify the facility as belonging to the Metro family and would be placed in prominent, highly visible locations. [Year 1]

Step 5: Receive consultant proposals and present cost-benefits analysis report to project work team. [Year 2]

Step 6: Review proposed expenditure in relation to overall plan priorities, define funding options and schedule implementation accordingly. [Year 2]

Tactic 2: Audit and increase, as needed, identification on Metro vehicles, including removable signs for leased fleet. [Years 2-3]

Strategy 5: Explore new public involvement methods

Redefine public involvement to include new methods and partnerships.

Tactic 1: Research and develop on-line community forum/discussion possibilities for Metro’s web site. [Years 1-2]

Step 1: Develop discussion forum plan. [Year 1]

- Select appropriate software (address privacy issues for participants and security issues for Metro or Multnomah County Library server).
- Develop strategy for getting media, community stakeholder organizations, appropriate web sites and search engines to link to site.
- Develop staffing plan, consider use of volunteers as moderators.
- Look at sponsorship possibilities.
- Develop publicity plan.

Step 2: Select issues for discussion. [Year 2]

- Use master calendar to identify departmental public outreach efforts and/or issues that will be considered by Metro Council.
- Invite experts and activists to post various points of view.

Step 3: Begin discussion forum on web site. [Year 2]

- Tie launch to current events/hot issues.
- Implement and continue to refine publicity plan.

Tactic 2: Enhance volunteer services. [Year 1]

Step 1: Review existing volunteer programs, looking for opportunities to engage people in Metro and educate them about behavioral changes that will protect the environment.

Step 2: Research implementation of an agency-wide volunteer program. Learn from successes of the Zoo, MERC and Parks volunteer programs.

Tactic 3: Enhance involvement of Metro citizen advisory committee members. [Years 1-2]

Step 1: Increase two-way communication. [Ongoing]

- Communicate Metro messages to citizen advisory committees.
- Create channels for members to give ideas and comments on Metro communications.

Step 2: Incorporate advisory committee members into other Metro communications strategies (i.e., volunteer service) whenever possible. [Years 1-2]

Step 3: Meet with advisory committee staff to identify means of working with

the Metro Committee for Citizen Involvement and Metro’s citizen advisory committees to develop an on-going, coordinated, agency-wide public involvement planning and assistance process. [Year 2]

Tactic 4: Expand outreach to diverse, traditionally underserved audiences. [On going]

Step 1: Review outreach expansion report (Metro Transportation, October 1996). [Year 1]

Step 2: Assess needs, cost and staff resources to translate publications and hotline information into foreign languages, implement as feasible. [Year 2]

Step 3: List bus numbers and/or other transit options specifically on all meeting or event notices. [Year 2]

Strategy 6: Improve public access to information

Increase and improve public access to Metro information.

Tactic 1: Expand/redesign Metro’s web site (See Appendix 2). Will include new design and technology to accommodate more information, easier access; easier updating; meet ADA requirements where possible. Will support other strategies, as noted throughout plan.

Step 1: Add a web-based master calendar of events relating to Metro programs and speaking engagements. [Year 1]

Step 2: Research development of a list serve with a form interface that enables users to sign up for e-mail lists to receive information on specific Metro programs or issues. [Year 1]

- Implement, based on findings. [Year 2]

Tactic 2: Research expansion of current information referral line. [Years 1-3]

Step 1: Research and review what actions are needed to establish a regionwide information and referral line. Possible areas of research include pending federal legislation and information referral being done by local jurisdictions in the Metro region. [Year 1]

Step 2: Use research to make decisions and implement, if feasible. [Years 2-3]

Tactic 3: Provide assistance and message training for all Metro front-line staff. [Year 1]

Step 1: Convene front-line staff and discuss their information and communications needs.

Step 2: Provide training on new Metro messages.

Step 3: Establish standard routing for referral of incoming calls for front desk staff. Establish procedures and customer service standards for front-line staff

Step 4: Provide materials requested by front line staff in discussion group or training sessions.

Tactic 4: Expand existing web-based document and image library and publication list. [Year 2]

Step 1: Assess feasibility and draft a scope of work based on available technology, staff time and expertise, including using resource of Metro’s archivist.

Step 2: Decide whether program will be carried out. May need to be completed incrementally.

Tactic 5: Distribute Metro information to libraries. [Year 2]

Step 1: Research distribution systems for placement of Metro materials in local jurisdiction libraries.

Step 2: Determine what current Metro materials are best suited for placement.

Step 3: Consider new materials. Estimate costs and staff time associated with production.

Step 4: Establish a regular distribution system for placement of materials. Consider use of volunteers.

Step 5: Establish a tracking system for each library and a method of restocking items as needed.

Step 6: Set up a system for evaluating the use of library materials and the long-term effectiveness of the program. Determine on-going costs.

Tactic 6: Streamline requests from referral organizations and agencies for national and international visitors. [Year 1]

Step 1: Research referral organizations and agencies most often requesting meetings and/or briefings for visiting delegations with Metro staff and elected officials (e.g., World Affairs Council, Portland-Oregon Visitors Association, Asia-Pacific Economic Cooperation).

Step 2: Establish an internal system to respond to requests from referral organizations and associations.

Step 3: Determine what Metro information materials and resources are best suited for responding to basic inquiries.

Step 4: Prepare and distribute packets of Metro information. Include information about Metro’s system for responding to requests. Train select professional staff of these referring agencies.

Tactic 7: Research expansion of cable access opportunities. [Years 1-2]

Step 1: Research and review what actions are needed to expand cable access opportunities. [Year 1]

Step 2: Use research to make decisions and implement, if feasible. [Year 2]

Strategy 7: Coordinate media system

Maintain effective, coordinated media system.

Tactic 1: Continue and enhance virtual internal media relations system – one pager number for all media calls, updated media contacts, coordinated monthly media calendars, monthly meetings and integrated news tips, enhanced coordination with off-site departments. [Ongoing]

Step 1: Schedule weekly meeting between council outreach and executive media staff to discuss common media-related issues.

Step 2: Remind staff periodically of the benefits and how-to of the agency’s media system and provide training for new public affairs staff.

Step 3: Work with all public affairs staff to manage hot issues.

Tactic 2: Streamline response to regional and non-regional reporters’ requests. [Year 2]

Step 1: Establish a dedicated media section on Metro’s web site.

- Determine information (e.g., news releases, fact sheets, select statements and speeches by elected officials, executive summaries of timely reports, key contacts list, links to related web site, visuals and examples to answer most commonly asked questions) that will be posted to media section and establish a system for regularly updating and adding information and materials.
- Advise regional reporters of the section, and direct non-regional reporters there.

Tactic 3: Brief new reporters. [Ongoing]

Step 1: Develop and produce briefing packets that include fact sheets, maps, etc. [Year 1]

Tactic 4: Continue coordinating print advertising buys for reduced cost per inch.

