

Date: Monday, April 26, 2010  
To: Michael Jordan, COO; Reed Wagner, Council Policy Director; Jim Middaugh, Communications Director  
From: Sheena VanLeuven, Council Policy Assistant  
Subject: Community Investment Strategy: Follow-up to 4/13/2010 Council Retreat

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## **Overview**

Metro is embarking on the development of a Community Investment Strategy (CIS) to help close the gap between the region's needs and its financial means. This strategy would be aimed both at maintaining existing infrastructure and community assets and at supporting targeted new investments to accommodate anticipated population and employment growth. It would focus on investing in downtowns, main streets and industrial and employment areas to support the achievement of community aspirations throughout the region.

The Metro Council met in a retreat on April 13, 2010 at Cooper Mountain Nature House to discuss and refine the Community Investment Strategy with Metro staff members. Following is a synthesis of the key information and ideas that emerged from the presentations and discussion at the retreat, which will inform Metro's approach to moving forward with the development and implementation of the CIS.

## **Review of Past Initiatives**

Metro has a history of undertaking major initiatives that have been formative to the agency and to the region, most recently the urban and rural reserves designation process. Reflecting on what has made many of these initiatives particularly successful reveals some lessons that may inform the development and implementation of a Community Investment Strategy. Mainly:

- Collaboration between Metro and regional stakeholders is essential. Metro has learned through experience that a collaborative approach is critical to the success of many of Metro's major initiatives. More goals are achieved and plans successfully implemented when there is greater collaboration among stakeholders.
- Metro plays an important role as a convener. Metro has been successful at bringing diverse regional stakeholders together to address a problem or opportunity who may not have otherwise worked together.

## **Public Opinion Climate**

Knowledge of the current public opinion climate on issues of government and public involvement is another useful tool for shaping an investment strategy. Opinion research reveals that the public is generally wary of government and what it sees as wasteful spending and ineffectiveness. The economy, and related issues such as tax reform and health care, is a worry for most citizens. This negative climate is furthered by the media, which has an increasingly negative tone and decreasing focus on substantive news. As Metro embarks on a major undertaking to invest in communities, taking this information into consideration will be critical to successfully honing the message and engaging stakeholders in all phases of the project.

## **Public Values and Investment Priorities**

Opinion research also offers insight on how the public prioritizes investments, and what core values and beliefs inform these priorities. These core values center on family and children, safety,

healthy lifestyles, financial security, a sense of community, and having control over essential needs. In turn, these values influence the public's investment priorities. The major themes that emerged include:

- Citizens value maintaining existing facilities and infrastructure before building new
- Services are valued over capital expenditures
- Capital projects are more palatable when they directly impact a community or neighborhood, with a "hyper-local" focus; sidewalks, transit, crosswalks, etc. are favored. Larger scale projects, with less visible positive impact, are often viewed as wasteful and fruitless
- Citizens value existing parks and green spaces, but do not list them as an investment priority

Two more key points arise from this opinion research. First, the public does not respond positively to the word "infrastructure", which evokes impressions of government waste, bureaucracy, and rules and regulations. Second, in terms of capital projects, the public is more willing to support large-scale projects when citizens feel they have input on the development and eventual realization of the project.

### **Lessons for the Community Investment Strategy**

The themes that arise from opinion research, combined with the knowledge of what approaches have worked in the past, can be distilled into some key lessons for moving forward with the development and eventual implementation of a Community Investment Strategy:

- First and foremost, finding the best way to frame the strategy is critical for gaining support from all stakeholders. The correct frame would encompass shared values and illustrate that Metro is responding directly to needs and priorities expressed by all stakeholders. Citizens, the business community, local governments, and so on need to see how they will benefit from this investment strategy.
- Furthermore, Metro must engage stakeholders in a meaningful way such that they feel they have a legitimate impact on the development and realization of the CIS. This includes asking stakeholders what their priorities are and soliciting input, rather than asking for approval of a predetermined set of investments.
- Outreach/engagement strategies will vary depending on the target audience; Metro cannot take a "one-size-fits-all" approach to engaging diverse stakeholders
- Transparency about the consequences and tradeoffs of an investment strategy is highly valued
- The Internet is an important tool for engaging with stakeholders; on the other hand, people also want more personal engagement rather than relying solely on email as a means of communication
- Determining the best messenger of the CIS is key; government is viewed warily and thus might not be the best messenger
- Identifying the right partners and forming strong partnerships with the business community, grassroots leaders, local elected officials, and others will be vital to the success of the CIS
- The public responds positively to examples of successful projects, so these examples may be used as a tool for public engagement in the CIS process

### **Remaining Questions and Next Steps**

Discussion at the retreat revealed some remaining questions and issues that must be addressed for the development of the CIS to move forward:

- The problem/opportunity statement for the CIS needs to be better defined and agreed upon by Metro Councilors and staff before being taken to stakeholders. What is the ultimate goal or purpose of implementing such an investment strategy?
- There is the recurrent question of “why Metro”- how does Metro in particular add value to community investments? Being able to answer this question, and communicate the answer to the public, has helped Metro be successful in past endeavors.

Besides addressing these questions, other short- and long-term next steps that emerged at the retreat include:

- Determine the best way to frame the CIS message for stakeholders; both consistency in messaging and the capacity to tailor the message to the audience are important
- Reassess the proposed timeline for the CIS process; the timeline may be too ambitious
- Create vehicles for delivering the message to diverse stakeholders, including video segments, commercial-length messaging, etc.

## **Conclusion**

As Wim Wiewel, Portland State University President, noted, Metro is a leader in many senses, and should not be hesitant to seize an opportunity to provide civic leadership in the region. The Community Investment Strategy is an opportunity for Metro to convene citizens, business community members, local elected officials and other stakeholders and provide the leadership needed to develop a collaborative plan to invest in communities and in the region as a whole. The lessons learned from the presentations and discussion at this retreat will be invaluable as Metro moves forward with forging partnerships, engaging with stakeholders, identifying investment priorities and eventually implementing a Community Investment Strategy.