Attachment #1



Santa Rosa CAB Strategic Plan Stakeholder Interviews & Focus Groups Summary Report

April 18, 2018

Table of Contents

Executive Summary	2
Process Overview	2
Findings Overview	3
Findings Details	4
Where We Are Now	
Where We Want to Be	10
How to Get There	14
Common Factors Affecting CAB's Future	14
Appendix	16

Executive Summary

Process Overview

From February 15 through March 9, 2018 the CivicMakers team met with two community groups, two former CAB grant recipients, five council members (including the Mayor), five staff members (including the City Manager), and 12 members of the Community Advisory Board. We posed a series of questions in three parts, as follows:

- 1. **Current State: Where we are now.** *What's currently working and/or not working with the CAB?*
- 2. **Future State: Where we want to be.** What does an ideal future look like to you? What would be a successful outcome of this strategic plan?
- 3. **Bridge: How to get there.** *What are the the most important next steps to move toward an ideal future?*

Please see **Appendix** for all interview protocols and focus group agendas.

Findings Overview

We have summarized the findings below in the form of a SWOT analysis, which identifies current strengths, weaknesses, opportunities, and threats.

Strengths	Weaknesses
 CAB has made some visible and tangible contributions to community engagement. CAB is helpful for providing community feedback in certain cases. CAB plays an important role in community engagement and CAB members are valuable assets to the community. CAB members have a good working relationship with each other. CAB has done some great engagement with the community. Having support staff has been helpful. Grant program has positive impact. 	 Certain segments of the community do not feel represented or engaged by the CAB. The current CAB meeting structure does not support dialogue with the community. Lack of clarity around CAB's roles & responsibilities and when not to involve CAB. Outreach and engagement efforts by CAB members are inconsistent. CAB needs support from staff in many cases. Lack of consistency with how individual Council members interact with CAB members. Relationship between CAB, Council, and staff lacks clarity. Lack of consistent onboarding process or criteria for CAB members.
Opportunities	Threats
 There is genuine desire for authentic and meaningful community outreach and engagement. The community could be truly represented by CAB and empowered to help resolve local issues that affect them. CAB being supported by both staff and City Council. Improved grant process. Improved CAB meeting structure. Potential for CAB to lead Participatory Budgeting. 	 Incoming district elections being seen as a potential replacement for CAB. Lack of clearly defined roles resulting in miscommunication between CAB, council, and staff. 2020 Council City Charter review potentially disbanding CAB.

Findings Details

The information below is a high-level summary of our findings, followed by a more detailed synthesis. The data has been broken into **major themes** (those that occurred more than twice during the data collection activities) followed by paraphrased quotes supporting each major theme. The numbers next to each theme indicate the number of times it emerged as synthesized by the paraphrased quotes. These findings will be used as inputs to the Community Advisory Board strategic plan.

Where we are now

This is the "current state" of the CAB according to stakeholder groups that represent the community. Consistent themes across all stakeholder groups include lack of clarity around roles and responsibilities of CAB members. CAB members and Council members alike do not have a consistent protocol for how and when to interact. Community groups are unsure how to engage with CAB. Lack of criteria for CAB members and onboarding process dilutes the efforts of otherwise passionate, motivated community members. District Elections could drastically affect how CAB is organized.

Community Perspective

The Community Perspective is based on two focus groups held on February 15 2018 with the Roseland Community Building Initiative and Santa Rosa Together, as well as interviews with former grant recipients from the Greater Cherry Street Neighborhood Association and North Bay Council Alternatives to Violence Project.

What's working?

Major theme: CAB has made some visible and tangible contributions to community engagement. (3)

- A member of the CAB regularly attends community group's meetings.
- Roseland specific plan was a success and a good example of staff listening closely to what the community really wanted.
- Mural engagement process, made possible by a CAB grant, was great and made a stronger neighborhood.

What's not working?

Major theme: The community, especially certain segments of the community, does not feel represented or engaged by the CAB. (6)

• Community members don't feel their biggest concerns (e.g., gangs, violence, safety, street drug use) are recognized or addressed by CAB/City.

- Even when community members share their concerns with the City, their concerns are not addressed so they don't feel heard.
- Some community groups have a lot of influence/presence at the City (including face-to-face meetings with Council and City Manager), while others don't know where to start in terms of sharing their concerns.
- CAB should be bringing the community together and representing the community's perspectives; because current perception is that this isn't happening, some other community groups have stepped in to try to bridge this gap.
- Some neighborhoods aren't being engaged/involved at all.
- There is no good process by which the community can influence decisions because, according to community members, those decisions have probably already been made and engagement tools "like surveys or putting marbles in a cup" are not substantial enough forms of community engagement.

Major theme: CAB needs to do more outreach/education to the Community. (3)

- Some community groups and many community members don't know about the CAB or how to interact with the CAB.
- Currently many community members don't know how to contact the City with their concerns. Instead they opt for calling the police in moments of crisis.
- Some community members will do online research to figure out how to contact the appropriate people at the City with their concerns. Many people rely on other community members to get this information.

Major theme: The current CAB meeting structure does not support dialogue with the community. (3)

- Lack of real engagement/dialogue at CAB meetings because of the rules they have to follow.
- Attending City Council meetings is not very effective, so the same structure shouldn't be replicated by the CAB.
- CAB meetings are only a few hours, each board member only speaks for a few minutes, each topic is only addressed superficially, and there is no room for real dialogue.

Major theme: CAB's mission/goals/role are unclear. (4)

- CAB's role is unclear and some Council members (according to the community stakeholders) feel that because it is Council's role to represent the community, they don't need the CAB.
- The CAB lacks structure and focus.
- The people are great, but the way the CAB was conceived (through the City Charter) lacks structure and clarity.
- CAB should not be involved in the CIP budget.



Major theme: Grant process needs more clarity

- Grant process is not efficient.
- Grant review process lacks clear criteria and transparency.
- Grant process could be used as a way to engender dialogue that doesn't currently happen/isn't possible at CAB meetings.

Staff Perspective

The Staff Perspective is based on one focus group held on February 22, 2018 with Managers and Directors from the City of Santa Rosa representing Transportation and Public Works; Recreation and Parks Neighborhood Services; Community Engagement; IT and the City Clerk's office. An interview with the City Manager is also included in this synthesis.

What's working?

Major theme: CAB is helpful for providing community feedback in certain cases. (3)

- Some staff report having good experiences working with CAB in terms of gathering community input, for example with the website redesign.
- CAB has hosted Open House events that have increased in attendance.
- Having structure for community input via CAB is helpful because it's difficult to gain input from the broad community otherwise.

What's not working?

Major theme: Lack of clarity around CAB's roles & responsibilities and when to involve CAB. (3)

- There doesn't seem to be consensus about the purpose of the CAB or their roles and responsibilities.
- The reason for CAB's involvement in the CIP budget is unclear.
- It is unclear both from the language in the City Charter and from Council direction when staff should involve the CAB.

Major theme: Outreach and engagement efforts by CAB members are inconsistent; CAB needs support from staff in many cases. (3)

- The CAB is supposed to be taking information back to the community, but that doesn't seem to be happening as it should.
- CAB needs support from City Staff in order to run public meetings that will gather actionable input and engage a large and diverse public.
- CAB needs support from City Staff to run public meetings effectively.

Council Perspective

The Council Perspective is based on five interviews with City Council members, including Mayor Chris Coursey, Vice Mayor Chris Rogers, Council Member Tom Schwedhelm, Council Member Julie Combs, and Council Member Ernesto Olivares.

What's working?

Major theme: CAB plays an important role in community engagement and CAB members are valuable assets to the community. (3)

- Successful CAB engagements have included neighborhood "expos," Town Halls, and gathering input from resident on the CIP budget
- CAB currently has more diversity in members, showing broader community representation
- Council uses CAB members to connect to the community

What's not working?

Major theme: Lack of consistency with how individual Council members interact with CAB members. (5)

- Council has never had a real conversation about how CAB is used
- Each CAB member gets different direction
- No standardization with how Council members interact with CAB
- Everyone is being on-boarded differently by their specific Council members
- Some CAB are treated as staff while others don't have any contact with appointees at all

Major theme: Relationship between CAB, Council and staff lacks clarity. (4)

- General attitude about ineffectiveness of CAB by staff and Council
- Lack of support for CAB from Council majority
- Meeting process is limiting; does not support dialogue and collaboration
- Vagueness in Charter leads to lack of understanding about role of CAB

Major theme: Lack of clearly defined roles and responsibilities for CAB. (4)

- CAB has no true identity
- Every 1-2 years CAB has to reinvent itself, preventing institutional memory
- No unified message about CAB
- No criteria for what makes an ideal candidate for CAB



Community Advisory Board Perspective

The Community Advisory Board (CAB) perspective is based on 30-minute phone interviews with 12 of the 14 CAB members conducted between February 22 - March 15, 2018.

What's working?

Major theme: CAB members have a good working relationship. (6)

- CAB has good open team dynamics
- CAB members demonstrate an eagerness to learn
- CAB members are good at bringing up issues
- Members are passionate
- CAB truly cares
- There are a lot of good people on CAB

Major theme: CAB has done some great engagement with the community. (6)

- Welcome Roseland festival, "town halls," use of social media to communicate with the community (e.g., during the fires)
- Members are good at answering community questions
- Advocacy for latino and immigrant communities, domestic working groups, and communities recently affected by the fires
- Members attend other community events and interact with community at events [tabling]
- Members walk in neighborhoods and distribute flyers
- CAB has diverse members representing community at large

Major theme: Having staff support has been helpful. (6)

- Community engagement office does a good job of communicating and coalescing
- Hiring of Community Engagement Director has led to more structure and support
- Community Engagement Coordinator recruits for CAB
- Staff helps facilitate information sharing between Council and CAB
- Staff asks CAB's opinion on issues
- Staff is responsive

Major theme: Grant program has positive impact. (4)

- Very tangible way for CAB members to connect with community groups
- Ability to see community projects through to completion
- Like hearing grant recipients talk about projects at Council meetings
- Grants help make CAB known in the community

What's not working?

Major theme: CAB/Council communication norms aren't clear/consistent (10)

• CAB needs better stipulation from Council on how to report back and overall interaction norms

- Need better understanding between CAB and Council & more consistent communication between individual Council members and their CAB members
- CAB and Council do not know how to utilize each other
- CAB members need more communication with council members
- Email updates are not done anymore
- Council doesn't return communication with CAB regularly
- No effective regular communication from Council
- CAB member feels ignored by Council members
- Irregular contact with Council member, not super communicative about feedback, pretty hands off and shows little interest
- Not a lot of interaction with my Council member
- Perception that Council doesn't value CAB
- CAB attends Council meetings but Council does not attend CAB meetings

Major theme: CAB mission/objectives are unclear. (6)

- Need to better define mission of CAB
- Need Council to put forth their vision for CAB as a whole
- Struggle with defining mission of CAB
- Objectives for CAB aren't clear
- Need better understanding about what CAB does for both current members and people who want to join

Major theme: Lack of consistent onboarding process or criteria for CAB members. (6)

- Not a lot of information or resources available to CAB members
- Staff fills in gaps in onboarding process left by Council (e.g., emails from Danielle)
- Only information provided to recent new member was about meeting process/structure
- Unsure of when to speak at meetings or how to bring up community issues
- Alignment between CAB members and the neighborhoods they represent is unclear
- Had to do my own research on CAB when I first joined
- CAB appointment process may not always result in members who represent the community or have the best skills for the job
- Council members may not be choosing the best candidates for CAB

Major theme: CAB meeting structure does not allow for dialogue with the community. (3)

- Need less formal and awkward format for meetings
- Meeting process could be streamlined to be less awkward, more interactive with public, and meaningful
- Meeting process improvement (more interactive with public)

Major theme: Grant process needs improvement. (3)

• Needs to be more efficient.

- No funding because of fires.
- Grants should be strengthened because they represent visible engagement with community

Where we want to be

Community Perspective

Community members would like two-way communication where CAB members are both bringing information to them and asking for their input to bring back to Council. Community members want to be meaningfully involved in decision making around issues that affect them.

Major theme: Desire for authentic and meaningful community outreach and engagement. (8)

If this were the case, the ideal future might look like this:

- Community representatives seek us out by visiting various community groups and other entities in the Roseland neighborhood (instead of the community feeling they always have to go to City) so they know what is going on in the community.
- Follow-through from City when community comes to them with their concerns
- City proactively shares information with the community
- Relevant meetings (e.g., regular CAB meetings, community workshops, etc..) are widely broadcast
- Incentives to get people to come to community group meetings and really care
- All meetings are translated to Spanish
- CAB organizes citywide discussion on key issues
- There is a lot of potential for CAB + Community Eng Office to be a unique organism where community volunteers (CAB) and City staff people come together to truly engage the community

Major theme: The community is truly represented by the CAB and is empowered to help resolve local issues that affect them. (5)

If this were the case, the ideal future might look like this:

- Community members can learn more about issues facing each other's neighborhoods and support each other
- Community members are empowered to know how to access City decision makers
- Neighborhoods are a true partner in helping to define City policy
- Community groups can easily share information about how to express concerns to the City with their extended community/neighborhood
- District elections are an opportunity to have true district representation by CAB members

• Council members who are very knowledgeable about the needs of their district and will be representing those needs (hopefully facilitated by district elections)

Major theme: CAB is supported by both staff and City Council. (3)

If this were the case, the ideal future might look like this:

- City Council enthusiastically embraces and supports the CAB in order to make it successful
- We have people at the City (staff and Council) who are cheerleaders for good community engagement
- The community knows and understands the distinct roles between staff, Council and CA, and how to interact with each of them

Major theme: Improved grant process. (4)

If this were the case, the ideal future might look like this:

- Allow time for more extensive discussion of grant proposals with grant recipients (it would be really great to have a larger forum and include businesses and perhaps some of the ideas could get business sponsors!)
- We need a triple bottom-line analysis for all grant applications
- Funding priorities are clear and transparent
- Ask organizations if they can do at least a portion of their projects with less funding as opposed to no funding

Staff Perspective

Staff wants to make sure CAB has the skills and abilities needed to effectively facilitate two-way communication between community groups, neighborhoods, Council and City departments.

Major theme: The CAB is a highly effective working group that is gathering input from the community and has adopted best practices for community engagement. (6)

If this were the case, the ideal future might look like this:

- Ideally CAB would be highly skilled at running effective community meetings, without the support of staff
- The CAB should have their contact list and should be able to mobilize people and effectively run meetings to get input
- Participatory Budgeting carried out by CAB (look to Long Beach as a model)
- Support neighborhood associations and local CBOs through trainings (and possibly certifications) to build their capacity to represent the voice of specific segments of the community (look to San Francisco's Empowered Communities Program model)
- Two CAB members for each district act as community liaisons
- Neighborhood empowerment strategies (like citizen academies) that provide a real benefit to communities, including incentives for participation. In order to work, this has to be "a two-way street"



Community Advisory Board Perspective

The existing CAB members would like to see a future state for the CAB where the Board itself has broader community representation and members have the skills necessary to do effective and equitable community engagement.

Major theme: CAB to play larger role in improved community engagement processes (13). *If this were the case, the ideal future might look like this:*

- Occasional change of public meeting locations
- CAB focuses on connecting different people in the community
- More CAB work in long-term community engagement projects (ex: building a garden/playground)
- CAB is more connected with decision makers and the community
- CAB hosts at least 5-6 town halls every year
- CAB members charged with finding out most immediate priorities from neighborhoods (could play a role in participatory budgeting)
- CAB members are actively engaged & reaching out to community
- CAB helps throw more events targeted toward getting the community together, especially the youth
- CAB serves as a convener that describes and helps people influence decisions
- CAB helps to close communication loops with community
- CAB should have meetings with key decision makers (i.e. Sheriff) and share information back with that community
- More formal structure around skills and abilities of CAB members
- Create a shared list of assets on what each CAB member brings (e.g., skills, experience, and background)

Major theme: Better community representation by CAB (4).

- *If this were the case, the ideal future might look like this:*
- CAB voices an informed community opinion and is able to answer questions of the public or notify Council members of concerns
- CAB meets with Council members and communicates back and forth with community
- More CAB member diversity in terms of their neighborhood representation
- CAB feels like their input is used by Council to make a difference
- Clear and consistent recruitment, onboarding and criteria for a more diverse and representative CAB

Major theme: Clearly defined relationship between staff, CAB and Council (4). *If this were the case, the ideal future might look like this:*

- Community Engagement department adds more staff
- Staff does not feel overburdened with administration for CAB

- Clear understanding between CAB and Community Engagement department regarding goals & objectives
- A strong connection between all three: Community Engagement department, CAB, and Council
- Council holds an annual meeting in person to answer questions of CAB members

Major theme: CAB outreach/public awareness/education. (6)

If this were the case, the ideal future might look like this:

- More online presence/awareness from public of what CAB and the City Council do and how they interact
- Residents know their government and have a connection to it
- Improved CAB onboarding / roles & responsibilities
- Effective training on being a CAB member
- A handbook that lists all neighborhood associations in districts with times of their meetings that CAB members are required to attend
- CAB educates community on how to get their needs met

Major theme: Improved CAB meetings. (2)

If this were the case, the ideal future might look like this:

- CAB is autonomous in its decisions about how to run its meetings
- Meetings allow for more dialogue between CAB and community members

Council Perspective

Council sees an opportunity for a well-trained CAB to help further community engagement methods like participatory budgeting and alignment between how Council, CAB, community and staff interact.

Major theme: A better understanding of what CAB should be and its original purpose. (7) *If this were the case, the ideal future might look like this:*

- Community, Council and CAB itself have an effective working relationship
- CAB should have a role in Council goal-setting i.e. taking input from community and relaying to Council with clear quantitative metrics of results
- Two way communication between CAB and Council
- CAB recommending policies for engagement to Council
- CAB to have advisory status for outreach policies
- CAB adds capacity because Council is not paid/does not have their own staff
- Strong branding for CAB so community better understands its roles and how to engage

Major theme: CAB could help further participatory budgeting initiatives. (2)

If this were the case, the ideal future might look like this:

• An expansion of the grants program, but more neighborhood-focused



• The City adopts participatory budgeting as one of its methods for community engagement and CAB helps to facilitate

How to get there

Each stakeholder group expressed curiosity about the role of CAB after district elections. With some outliers, groups agreed that CAB could play a role if the mission and vision of CAB are clearly defined and CAB has the skills necessary to implement its new direction.

Community Perspective

- Take a neighborhood approach to community engagement where neighborhoods are organized and empowered to effectively organize, communicate with the city, and help make decisions.
- The Community Engagement Department should be deeply involved with the implementation of the Strategic Plan.
- Involve community and neighborhood-specific groups in the strategic plan to ensure it aligns with their needs and is available in their native language.

Staff Perspective

- Need to more clearly define qualifications/criteria for joining the CAB.
- Need more clarity around the CAB's role in general (e.g., why are the involved with the CIP budget process? Should they be involved? If so, what exactly should their involvement look like?).
- When people join the CAB, they should all get the same information about the CAB's structure and purpose and their specific roles and responsibilities.
- Need input from the community about how they want to be engaged.
- No clear definition by the community of what community engagement means to them different neighborhoods/groups seem to define it differently.
- Want to provide additional ways to engage community, including digital as opposed to just through public meetings.
- CAB will need to determine its role after district elections.

Council Perspective

- Training for staff in community engagement; CAB training for history, community, demographics of Santa Rosa and resources for where to meet people, more choices for how to engage with people.
- Doing research on successful models that include community training, multi-stakeholder engagement processes, strategic plan
- CAB should figure out internally how to be most useful to Council



Community Advisory Board Perspective

- Improve quality, consistency and frequency of communications to community (5)
- Talking points to inform community on Council updates and decisions
- More engagement & advertising from CAB members
- CAB members sitting in on relevant Council meetings to relate to their respective advocacy groups
- Change meeting processes
- Higher frequency of CAB meetings to facilitate communication between community, Council and CAB members
- Share information with other City leaders beyond City Council
- Clarify CAB Mission
- Onboarding /Organization
- CAB should help facilitate finding solutions for the challenges facing the community
- CAB members do more skill building
- Community representation live in the neighborhood you represent
- Push the message that everyone is welcome
- Define where CAB will be after district elections

Common Factors Affecting CAB's Future

Below are common factors mentioned during the stakeholder engagement phase of the project as factors that are currently affecting CAB and/or may affect CAB's future:

- Resources re-directed after fires
- Interaction with Open Government Task Force
- District Elections
- Relatively new Community Engagement Department
- Competing priorities for Community Engagement Department and the City as a whole

Appendix

Community Focus Group Agenda

- 1. Welcome & Background (5 mins)
 - City project manager & CivicMakers introduction
 - Brief overview of the CAB's roles/responsibilities
 - Brief explanation of the strategic planning process & project goals

2. Facilitated Discussion (50 mins)

- Share objectives of the discussion
- Explain (show) discussion framework



3. Wrap-up & Next Steps (5 mins)

- We welcome ongoing feedback
- We will share the draft strategic plan for your review

Community Interview Protocol

- 1. Tell us *briefly* about yourself.
- 2. What is currently working well and what could be improved in terms of the CAB's role in representing the community and acting as an advisory body to City Council?
- 3. What is your ideal vision for the future for the CAB/Community Engagement in Santa Rosa / Grant Program?
- 4. What are some concrete steps you think need to be taken to to move toward the ideal state you described? For example, what should be prioritized, what are the primary roadblocks that need to be overcome, etc...?

Staff Focus Group Agenda

1. Welcome & Background (5 mins)

- CivicMakers introduction
- Brief overview of the CAB's roles/responsibilities
- Brief explanation of the strategic planning process & project goals

2. Facilitated Discussion (50 mins)

- Share objectives of the discussion
- Explain (show) discussion framework

1. Where we are now (Current/historic interaction with CAB).		2. Where we want to be (Future vision for CAB)
What's currently working and/or not working with the CAB?	3. What we need to do to get there (priorities, focus areas, potential roadblocks, inspiration) - AKA the bridge between present & future.	What does an ideal future look like to you? What would be a successful outcome of this strategic plan?
	What are the the most important next steps to move toward an ideal future?	

3. Wrap-up & Next Steps (5 mins)

- $\circ \quad \text{We welcome ongoing feedback}$
- We will share the draft strategic plan for your review

Staff Interview Protocol

- 1. Tell us *briefly* about yourself. Have you ever served on the CAB?
- 2. What is currently working well in terms of the CAB's role in representing the community and acting as an advisory body to City Council?
- 3. What is your ideal vision for the future for the CAB? What would a successful outcome of this strategic planning process look like? For example, what should their role be, how should the CAB be structured, how should the CAB interact with City Council and the Community?
- 4. What are some concrete steps you think need to be taken to to move toward the ideal state you described? For example, what should be prioritized, what are the primary roadblocks that need to be overcome, etc...?

Council Interview Protocol

- 1. Tell us *briefly* about yourself. How long have you served on City Council? Have you ever served on the CAB?
- 2. What is currently working well in terms of the CAB's role in representing the community and acting as an advisory body to City Council?
- 3. What are the other ways (besides CAB input) you receive information about community needs, concerns, and preferences? How do you generally use this information when making decisions?
- 4. What is your ideal vision for the future for the CAB? What would a successful outcome of this strategic planning process look like? For example, what should their role be, how should the CAB be structured, how should the CAB interact with City Council and the Community?
- 5. What are some concrete steps you think need to be taken to to move toward the ideal state you described? For example, what should be prioritized, what are the primary roadblocks that need to be overcome, etc...?

CAB Interview Protocol

- 1. Tell us *briefly* about yourself. How long have you served on the CAB and why did you want to serve on CAB? Day job?
- 2. What is currently working well and what could be improved in terms of the CAB's role in representing the community and acting as an advisory body to City Council?
- 3. What is your ideal vision for the future for the CAB? What would a successful outcome of this strategic planning process look like? For example, what should their role be, how should the CAB be structured, how should the CAB interact with City Council and the Community?
- 4. What are some concrete steps you think need to be taken to to move toward the ideal state you described? For example, what should be prioritized, what are the primary roadblocks that need to be overcome, etc...?