Oregon Shines III Business Plan

September 2008

For more information, please contact:
Rita Conrad, Executive Director
503-378-3202
Rita.R.Conrad@state.or.us

Progress Board Members

The Honorable Theodore R. Kulongoski (Chair)
Governor
State of Oregon

Pat Ackley
Management Consultant
Ackley Associates
Sunriver, OR
(Congressional District 2)

Raymond C. Caballero
Portland, OR
(Congressional District 3)

Sue Densmore
Owner and President, Sue Densmore Communication Strategies
Medford, OR
(Congressional District 2)

The Honorable Sara Gelser
State Representative
Corvallis, OR

The Honorable Annabelle Jaramillo
Commissioner
Benton County
(Congressional District 4)

Joe Johnson
Retired former President
Oregon Community College Association
Oregon City, OR
(Congressional District 5)

Michael Jordan (Vice Chair)
Chief Operating Officer
Metro
Portland, OR
(Congressional District 5)

Robert Landauer
Retired newspaper editor and columnist
Portland, OR
(Congressional District 1)

John Miller
President
Wildwood, Inc.
Salem, OR
(Congressional District 5)

The Honorable Frank Morse
State Senator
Albany, OR

Tom Potiowsky
State Economist
Department of Administrative Services
Salem, OR
(Congressional District 1)

Scott Harra (Ex-officio)
Director
Department of Administrative Services
Salem, OR

Michael F. Olson (Student Ex-officio)
Oregon State University
Corvallis, OR

OREGON IN 2029

While the population continues to grow and prosper, Oregon's natural environment remains one of the most clean and stunning in the nation.

The economy is robust and per capita incomes in Oregon exceed the national average.

The state's diverse populations are an integral part of Oregon's rich culture.

Oregonians give high marks to their state and local governments for trust and accountability. They listen and support strong, vibrant communities throughout the state.

Acknowledgements

The Progress Board wishes to thank the Oregon Community Foundation, the Ford Family Foundation and Brett Wilcox for their financial support of the Oregon Shines III design process and development of this business plan.

The Board also thanks Peter Senge and colleagues for their leadership and work in systems thinking and collaboration, which has informed and helped to shape the design of Oregon Shines III and this business plan.

Finally, the Board expresses its sincere appreciation to the following policy experts, public servants and civic leaders throughout Oregon who offered their insight and wisdom.

Oregon Shines III Partner Panelists: Gail Achterman, Jim Azumano, Lynn Beaton, Lita Colligan, Doris Penwell, Duncan Wyse, Sue Hildick, Renee Leger, Salam Noor, George Pernsteiner, James Sager, Wendy Radmacher-Willis, Kent Snyder, Robin Teater, Joyce White, Swati Adarkar, Liz Baxter, Ben Boswell, Bob Nikkel, Erinn Kelley-Siel, Mickey Serice, Doug Stamm, Martha Brooks, Eriks Gabliks, Judge Darryl Larson, Joe O'Leary, General Raymond Reese, Craig Prins, Max Williams, Janet Byrd, Matt Garrett, Rob Hallyburton, Victor Merced, Ethan Seltzer, Gail Shibley, Dave Morman, Phil Ward, Steve Williams, Andrea Durbin, Angus Duncan, Sara Vickerman

Oregon Shines III Stakeholder Interviewees: Governor John Kitzhaber, Tom Gallagher, Doug Stamm, Charlie Walker, Tim Nesbitt, Mike McCauley, Mike McArthur, Dawn Farr, Mickey Lansing, Neil Bryant, Dave Frohnmayer, Diane Snyder, Bev Stein, Brett Wilcox, Jeff Tryens, Duncan Wyse, Jerry Kissler, Sue Hildick, Gail Achterman, Wendy Radmacher-Willis, Robin Teater, Bruce Weber, Barbara Sidway, Bob Repine and members of the Progress Board.

Participants in the IT workshop: Curtis Wright, Matthew Tschabold, Alice Phalan, Dawn Farr, Gerry Uba, Scott Smith, Laura Rose Misaras, Jay Grussing, Richard Boucher, Mindy Crandall, Lena Etuk, Marie Deatherage and Katie Shriver

Participants at the Millennium Institute presentation: Mike Marsh, Lisa Gains, Mindy Crandall, Lena Etuk, Bruce Weber, Duncan Wyse, John Miller and Jay Grussing

Participants at the Hewlett-Packard Halo conference: Peter Senge, Steve Jewell-Larsen, Patrick Tiernan, Robin Teater, John Miller, Annabelle Jaramillo, Dennis Sandow and Anne Murray Allen. A special thanks goes to Steve Jewell-Larson and Hewlett Packard for their cutting-edge technology that makes participants feel they are there in person even though they are on the other side of the continent or world!

Local Case Studies: Harvey Bennett, Gaylen Carslile, Roi Crouch, Ron Kramer, Liz Shelby, Rick Levine, Sue Densmore, Tam Moore, Ian Hill, Diane Snyder, Brinda Stanley, Nils Christoffersen, Don Harker, Doug McDaniel, Bruce Dunn and Phil Shepard

Consultants on design and business plan development: Anne Murray Allen, AMA Associates, LLC and Dennis Sandow, Reflexus Company

Industry resources: John Blakinger, Blakinger Associates; Tirza Hollenhorst, ifPeople; Beth Jandernoa, The Ashland Institute; Andrea Bassi, Millennium Institute; John Mills, J. Mills Company; Scott Spann, Innate Strategies; Laura Rose Misaras

Table of Contents

Acknowledgements 4
Executive Summary 7

1. Introduction 9
2. The Situation 10
3. A Different Opportunity 11
4. What's at Stake 12
- Four Phases

5. What It Will Take 13
- Work Streams

6. How It Will Get Done 15
7. The Investment Required 17
- Two-Year Budget Summary
- What Will Continue after Execution Stage?

Appendix A. Oregon Shines III partner panels 21
Appendix B. Stakeholder interviews 23
Appendix C. Three Case Studies of Local Accomplishment 26
Appendix D. Key Decision Overview and Timeline 30
Appendix E. Systems Dynamic Modeling 31
Appendix F. Oregon Shines III Logic Model 32
Appendix G. Work Stream Detail 33
Appendix H. Budget Detail 37

Executive Summary: Oregon Shines III Business Plan

Basic Message

Oregon Shines is our state's strategic plan to accelerate progress toward three inter-related goals:

- Quality jobs for all Oregonians;
- Engaged, caring and safe communities; and
- Healthy, sustainable surroundings.

During the first two iterations of Oregon Shines, the Oregon Progress Board charted the state's progress toward these goals with measures called the Oregon Benchmarks. This tradition will continue with Oregon Shines III. The process will identify key, cross-cutting, high-leverage strategies for achieving the goals and update the benchmarks. It will strive for a better understanding of the inter-connectedness of the benchmarks and the long-term consequences of our actions.

Oregon Shines III will then take a giant step forward. It will move beyond planning and analysis to local community action and engagement. It will study and amplify how communities with vision and passion are making progress on the benchmarks. Oregon Shines III will learn about and promote these efforts through the media and a dynamic Web presence. Any citizen will be able to find relevant data and exchange ideas on benchmark-related solutions for challenges that matter to them. Governments will see how to be more entrepreneurial and supportive. Foundations will have an opportunity to better understand their effect on local communities.

All this will help us better invest our resources – in Oregon's people and places – for quality jobs, great communities and a healthy, sustainable environment.

Assumptions

Oregon Shines III partner panel findings, summarized in Appendix A, inspired these underlying premises for Oregon Shines III:

- Continuous data and dialogue are necessary for progress to occur because everyone and everything is connected within complex, constantly changing systems.
- Significant progress happens when people with shared goals self-organize, often across organizational boundaries, to achieve results.
- Institutional systems and structures need to be more supportive of these entrepreneurial efforts and more strategic about achieving results within complex systems.

Four Phases

The Take Stock and Re-Think phases represent the traditional Oregon Shines planning exercise – analysis, goal and strategy development, benchmark update and development of the plan document.

The Pull Together phase will study and amplify how progress toward the benchmarks happens. It will promote those efforts through the media and a dynamic, collaborative Web presence, where people can connect and collaborate on improving their communities.

The ongoing Stay Focused phase will keep Oregon Shines on the radar of state and local policy makers and all Oregonians. This phase will continually report quantitative data to show how we are doing collectively on the goals. It will continually provide qualitative data on how partners in and out of government are making benchmark-related progress in communities across the state.

Two-Year Budget

Industry resources have submitted cost estimates on a goodwill basis to the Progress Board. Based on these estimates and other information, an estimated $2,429,526 will be needed for a two year period. This includes:

1. $346,000: in-kind contributions and donations
2. $430,766: permanent, ongoing expense to the state for sustaining the Oregon Shines III investment, being requested in the 2009-11 budget cycle
3. $1,612,760: one-time requests to foundations and other potential sponsors in and out of Oregon

1. Introduction

The challenges and forces at work affecting Oregon's future have never been more complex. With each passing day, we receive news of global crisis in our climate, our food supply and our economy. Oregonians *feel* these forces on a daily basis. Never has it been more urgent for us to respond in a way that conserves and expands our economic, social and environmental well-being. What follows is the Oregon Progress Board's proposal to help make that happen.

Oregon Shines III will continue the award-winning tradition of two previous planning processes.[1] It will establish priories and identify key, cross-cutting opportunities to solve the challenges facing Oregon's future. It will engage stakeholders with dialogue and data. It will foster more integrated institutional approaches to serving the citizens of Oregon.

Oregon Shines III will also take an immense step forward. It will move beyond traditional planning and analysis for a deeper look at local community engagement around the Oregon Benchmarks.

Oregon Shines III will take an immense step forward. It will move beyond traditional planning and analysis to local community engagement and entrepreneurship.

Based on recent projections from the Governmental Accountability Office,[2] we know that government budgets will suffer increased stress in coming years. Future progress must come from local communities. Several case studies in this business plan show how community partners are already making progress toward multiple Oregon Benchmarks. Many more examples exist and they are eager to share their stories to help others and have a positive impact government policy.

Oregon Shines III will capture their stories in a framework that focuses on data and encourages dialogue. A dynamic Web presence will showcase benchmark successes and connect them to others for insight and inspiration. Governments will see how responsible on-the-ground entrepreneurship enhances well-being and how they can better support these local processes. Communities will be able to learn from and inspire each other. Where foundations are involved, they will have a better view of their local impact.

The aim of this new approach is to leave public and private sector decision-makers better equipped to help improve performance, not just measure it. The underlying tactics emphasize experience and data. They will go far to achieve the Progress Board's mission, which is to "make Oregon Shines a reality and the benchmarks useful tools for Oregonians working to improve their communities."

[1] The first Oregon Shines was done in 1989. Oregon Shines II was done in 1997. The Progress Board received awards from the Corporation for Enterprise Development in 1992 and the national Ford Foundation 1994 (\\SANCLUSTER\OPB\Common\Board\History\Achievements.doc). The statutory basis for Oregon Shines is ORS 285A.150, 162, 165, 168, and 174.

[2] See a March, 2008 slide show entitled "Saving Our Future Requires Tough Choices Today" by David Walker, then Comptroller General of the U.S. at http://www.gao.gov/cghome/d08584cg.pdf.

2. The Situation

Oregon Shines was established by the Legislature in 1989 as an economic recovery plan. In the booming 1990's, Oregon Shines II became a more holistic strategic plan for overall well-being. Both versions of the plan acknowledged the *interconnectedness* of social, economic, and environmental factors and offered strategic frameworks for moving forward. Both planning processes engaged Oregonians and determined quantitative measures of societal progress.

Key to the success of Oregon Shines (I & II) was the creation of the Oregon Benchmarks to ground the plan in data and keep Oregonians focused on their progress. Today there are 91 Oregon Benchmarks organized inside social, economic, and environmental domains. World-renowned, they have helped to frame Oregon's public dialogue for 20 years.

Despite this tradition and benchmark-related private sector innovations like the Chalkboard Project[3], Oregon still has challenges. The 2007 Benchmark Performance Report[4] illustrates, for example, that while Oregon easily met its 2005 target for third grade math, the average educational attainment of Oregonians over 25 years of age pulled this family of benchmarks into negative territory (see table).

Numerous factors will make accelerating Oregon's future progress even more challenging. The federal fiscal situation will continue to push the burden of services from the federal to state, state to county, and county to local levels. The latest symptom of this is the loss of federal timber payments to Oregon's counties. Oregon also feels the effects of rapidly changing demographics; the consequences of our globalized economy; an increase in the price of fuel; and the effects of global warming.

Benchmark Short Title	Making Progress?
EDUCATION OVERALL	**NO, BUT**
Kindergarten—12th Grade	***Yes, but***
18. Ready To Learn	Yes, but
19. Third Grade Skill Levels	
a. Reading	Yes, but
b. Math	Yes
20. Eighth Grade Skill Levels	
a. Reading	Yes, but
b. Math	Yes, but
21. Certificate of Initial Mastery	No targets
22. High School Dropout Rate	Yes
Postsecondary (age 25+)	***No, but***
23. High School Completion	No
24. Some College Completion	No, but
25. Postsecondary Credentials	Targets TBD
26. College Completion	
a. Bachelor's Degree	No, but
b. Advanced Degrees	Yes
Skill Development	***No, but***
27. Adult Literacy	Targets TBD
28. a. Computer Usage	No
b. Internet Usage	Yes
29. Labor Force Skills Training	No

[3] An independent, non-profit organization working to improve Oregon's K-12 public schools: www.chalkboardproject.org

[4] The 2007 Benchmark Report can be accessed at www.oregon.gov/DAS/OPB/docs/2007Report/2007_Benchmark_Highlights.pdf.

3. A Different Opportunity

Learning from over 11 years since the last revision of Oregon Shines, the Oregon Progress Board proposes a design for Oregon Shines III that is different from yet builds on the strengths of Oregon Shines I and II. The Board is able to do this because it is uniquely positioned in statute to focus on Oregon's long-term issues as an independent and neutral convener.[5] The Board can help bring to the forefront a common understanding of Oregon's whole picture. Without that, even with the best of intentions, people often work at cross-purposes.

Over the course of 18 months, the Progress Board hosted seven panels of experts on economy, education, civic engagement, health and well-being, public safety and the built and natural environments. Panelists were asked to identify the key issues that Oregon Shines III should address.[6] In addition, consultants interviewed 35 leaders and stakeholders across Oregon on what they felt were the critical success factors for Oregon Shines III.[7] Analyzing findings from both exercises yielded a design that forms the basis for this business plan.

What makes Oregon Shines III a different opportunity?

"It's not just a fish problem or water problem. It's interconnected."

Gail Achterman, Natural Environment Panel, October 2007

Two new approaches will bring a greater understanding of how progress toward the benchmarks is made. First, Oregon Shines III will *take a more integrated, systems approach to strategy development and the benchmarks*. We know that the benchmarks are interrelated and co-dependent. As Gail Achterman says, "It's not just a fish problem or water problem. It's interconnected. There is a huge job to do regarding critical environmental issues that the traditional silo approach is incapable of answering."

Second, for the first time, Oregon Shines will *build the infrastructure through which we can learn from and be inspired by communities making benchmark-related progress*. We have learned people are willing to share their stories if it will help others and have a positive impact on policy. Oregon Shines III will link their stories to the Oregon Benchmarks and promote them to others with like interests. Any citizen will be able to find relevant data and exchange ideas on benchmark-related solutions for challenges that matter to them. Governments will see how to be more entrepreneurial and supportive. Where foundations are involved, they will be able to better understand their impact on local communities.

Three illustrations of local accomplishments are shown in Appendix C. They each contribute to multiple benchmarks. They also demonstrate community engagement and collaboration, entrepreneurial thinking and local innovations within complex systems.

[5] Oregon Revised Statute: ORS 285A.150 (3)
[6] Appendix A
[7] Appendix B

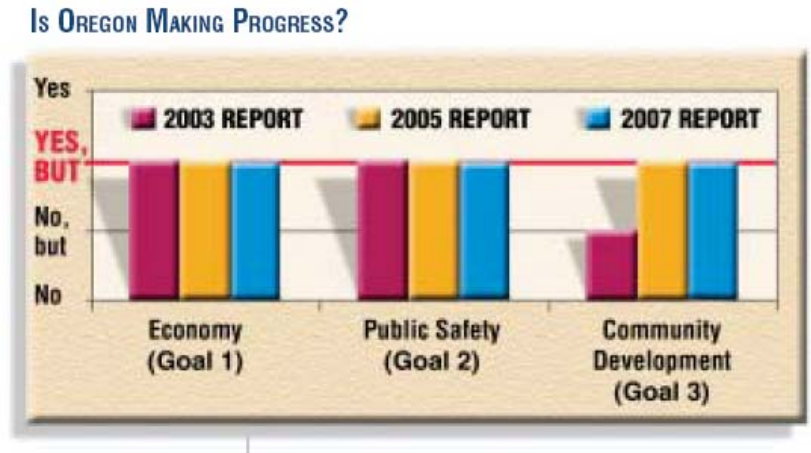
4. What's at Stake

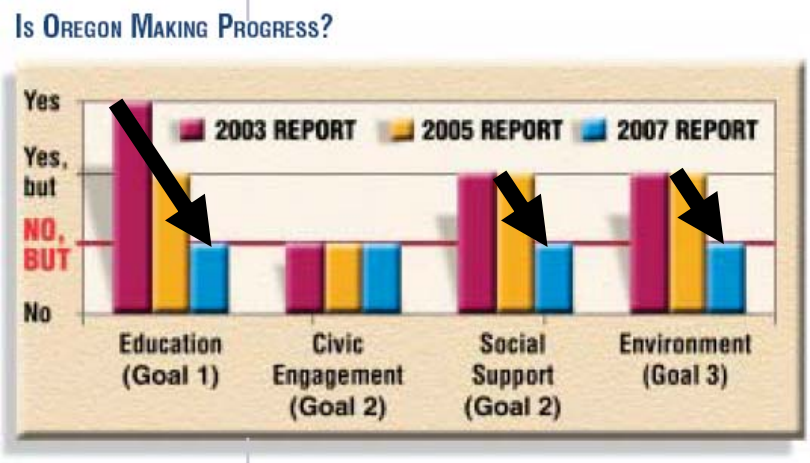
Twenty years of benchmark reporting shows that Oregon's results remain mixed.

The graphics below are from the April 2007 Benchmark Performance Report.[8] The top chart shows that at that time, Oregon's overall benchmark progress for economy, public safety and community development was in positive territory ("Yes, but").

The bottom chart shows a drop in education, social support and the environment between the 2005 (yellow bars) and 2007 (blue bars) benchmark reports. None of the benchmark categories improved in that two-year period.

We can do better. With a deliberate shift to a more collaborative, integrated approach, Oregon will be better able to achieve real progress and well-being for the citizens of this state.





[8] The 2007 Benchmark Report can be accessed at http://www.oregon.gov/DAS/OPB/docs/2007Report/2007_Benchmark_Highlights.pdf.

5. What It Will Take

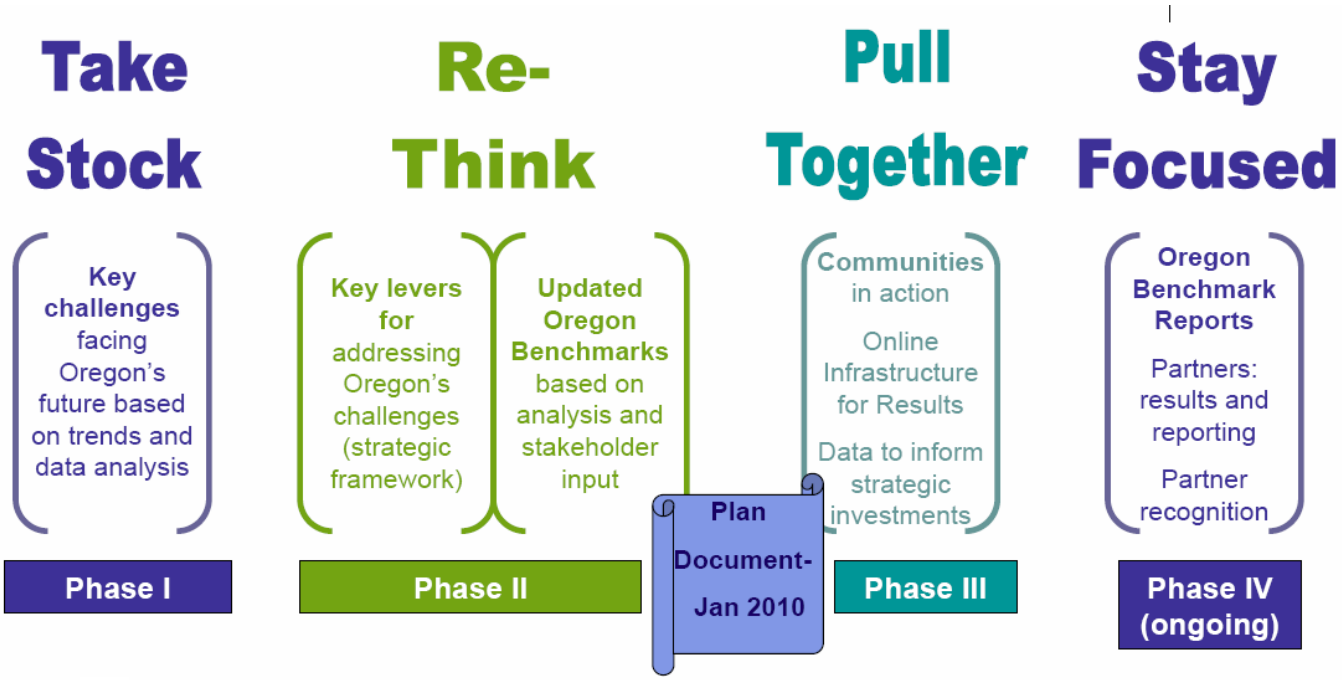
Oregon Shines III partner panel findings, summarized in Appendix A, inspired these underlying premises for Oregon Shines III:

- Continuous data and dialogue are necessary for progress to occur because everyone and everything is connected within complex, constantly changing systems.
- Significant progress happens when people with shared goals self-organize, often across organizational boundaries, to achieve results.
- Institutional systems and structures need to be more supportive of these entrepreneurial efforts and more strategic about achieving results within complex systems.

The design of Oregon Shines III addresses these premises by introducing tools and methods that help us see the systems we are in, the highest-leverage drivers of our shared goals, the potential consequences of our decisions and how benchmark progress is currently happening across Oregon. The two-year process will engage policy and benchmark experts, state and local decision-makers, stakeholders and citizens across the state.

Four Phases

The process is organized into four distinct but overlapping phases. The Progress Board will oversee this process and will make key decisions along the way based on input from all involved. A preliminary overview of the board's key decisions and timeline is shown in Appendix D.



Phase I: Take Stock

The goal of this analysis phase is to *take stock* of and publicly discuss the key challenges facing Oregon's future and to increase our understanding of how progress occurs across all three goal areas (economic, social and environmental). This phase will analyze global, national and state benchmark trends and facilitate an analytical process to understand the key drivers of our goals and benchmarks in selected policy areas such as education, human services, public safety and energy and emissions.

Phase II: Re-Think

The goal of Phase II is to *re-think* how to achieve the Oregon Shines goals. It will synthesize the findings from the Take Stock phase into new priorities and strategies for consideration by government agencies, policy makers and communities. This phase will re-examine the Oregon Benchmarks to reflect the interconnectedness of economic, human and environmental factors. The Re-Think phase will conclude with the release of the Oregon Shines III document, which will inform subsequent work streams.

Phase III: Pull Together

The goal of this phase is to *pull together* information and people from across the state to help achieve our shared goals. It will connect local communities and citizens and arm policy-makers, investors and partners with better data for dialogue and decision making.

This phase will study and promote, via the Web and media, the accomplishments of partners – private and public – in advancing benchmark progress in their communities. Benchmark-related results from in and out of government will be linked to Oregon Benchmarks in an enhanced, dynamic Web presence. This online "Infrastructure for Results" will allow communities to connect and learn from one another. It will provide foundations, government agencies and policy-makers a growing body of information about what is working on the ground.

The Pull Together phase begins in the earlier phases. Local ambassadors of Oregon Shines III will attend community meetings to invite participation and seek information about local accomplishments. A separate rotating series of six "Oregon Shines III Conversations" will occur between each phase to connect members of the Progress Board, local elected officials, civic leaders and partners. The conversations will seek input on the plan, the benchmarks, and reflect on what is being learned through the process, especially its significance to local communities.

Phase IV: Stay Focused

The goal here is to *stay focused* on the goals of Oregon Shines and on how progress is being made towards the benchmarks. It will provide continuous benchmark data reporting and continually add local data and inspirational stories to the online "Infrastructure for Results". It will provide tools to connect like-minded people across Oregon who are working to improve their communities. It will be a framework that can help shape public policy.

6. How It Will Get Done

Specific work streams have been developed in order to efficiently manage and seamlessly blend the four specific phases of Oregon Shines III.

Eight work streams seamlessly blend the four phases of Oregon Shines III

Work streams:	Take Stock ~3 months	Re-Think ~ 9 months	Pull Together ~ 12 months	Stay Focused ongoing
1. Public engagement	*Attend local meetings to build awareness, enthusiasm and collaboration among local leaders about what is happening to increase benchmark progress in their areas and to invite learning from each other (24 months)*			
2. Analyze trends and other factors	*Identify key challenges facing Oregon (~3 months)*			*Finalize the updated benchmarks for reporting (~3 months); sustain an integrated or systems approach to policy (ongoing)*
3. Update the benchmarks and produce the plan		*Stakeholders collaborate to identify key levers/strategies, update the benchmarks and create a compelling OSIII story (plan) (~6 months)*		
4. Oregon Shines III Conversations	*Six, rotating around the state to dialogue*	*about what we are learning via OSIII,*	*seeking input on benchmarks,*	*local engagement and next steps*
5. Study, promote local successes		*Identify, study and promote local benchmark-related successes to increase engagement, collaboration & well-being across Oregon (~18 months & ongoing)*		
6. Web Presence: "Infrastructure for Results"		*Interactive Web space where benchmark innovations can be recorded via data reporting and stories and where people with similar goals can connect and collaborate on improving their communities (~18 months & ongoing)*		
7. Project Evaluation		*Evaluate OSIII project results and make lessons learned available for the benefit of others (18 months)*		
8. Project Management	*Coordinate all work streams, proactively address any issues and communicate consistently with stakeholders about results along the way; includes oversight, planning, public relations and performance reporting*			

Work Streams

Public engagement is designed to build awareness, enthusiasm and collaboration among local leaders around what is happening to increase benchmark progress in their areas. It will invite learning from participants. The Progress Board will partner with the American Leadership Forum (ALF) Senior Fellow network to participate on the agendas of approximately 50 local and regional meetings across Oregon and to serve as ambassadors for Oregon Shines III in their own communities.

The analysis of trends and policy areas is primarily in the Take Stock phase. It will examine global, national, state and benchmark trends in partnership with the Oregon Business Council. It will identify key challenges facing Oregon's future. "Systems dynamic modeling" (Appendix E) is recommended to enhance our understanding of how progress happens and to identify key, cross-cutting high-leverage drivers in key public policy areas. For cost estimates only, the design assumes that this will be done for Oregon's most expensive public investments - education, corrections, human services - in addition to energy and emissions. Estimates also include training for Oregon modelers[9] in order to embed capacity to adapt the tool for future Oregon users at state and local levels. An online user interface will allow local governments, foundations and stakeholders across Oregon to download and use the tool for selected issues.

[9] The intent is to partner with universities to create a non-partisan policy research function for Oregon.

Strategy development, updating the benchmarks and writing the plan document will occur mainly in the Re-Think phase. This work stream will synthesize the findings from the analysis into a new strategic framework for Oregon Shines. It will re-examine and re-organize the Oregon Benchmarks to acknowledge the inter-connectedness of economic, human and environmental factors and provide a more accurate way to learn from Oregon's progress and accomplishments. The benchmarks will be finalized after receiving and integrating local feedback from around the state in the Oregon Shines III conversations (next work stream).

Oregon Shines III conversations will occur between phases. These dialogues will provide an opportunity for Progress Board members, partner panel experts, and other state and local leaders to reflect on what we are learning from the analysis and local communities. These conversations will also be used to seek feedback on the benchmarks.

Thse facilitated sessions will rotate to locations across Oregon. A cross-section of local civic leaders and others will be invited to participate. The result of these conversations will be a greater awareness of how progress and well-being happens, how local experiences and successes can be shared with others and how it all contributes to the statewide goals.

Study and promote benchmark-related accomplishments will be based on social action research.[10] Consultants will work with university students, the American Leadership Forum and others to study what is working to advance benchmark-related well-being in communities. Findings will be promoted through the Web and media. Communities will be invited to connect with each other around shared goals. Decision makers will be invited to explore opportunities for better policy and improved government structures and systems. Where foundations are involved, they will be better able to see how they impact local communities.

Three case studies:

- **Rogue Community College increased enrollment from 2,000 to 12,000 students.**
- **Wallowa Resources is transforming a resource extraction economy to one of restoration, entrepreneurship and land management.**
- **SeQuential Biofuels offers the first biofuel fueling station in the Pacific Northwest and is expanding production without affecting food supply.**

Three illustrations of local accomplishments are summarized in Appendix C:

- Increasing the enrollment of community college students
- Transforming a regional resource extraction economy
- Offers the first all biofuel station in the Pacific Northwest and is expanding production without affecting food supply

[10] Social action research is a method for studying and amplifying how accomplishments are achieved by on-the-ground partner networks. It is a "bottom-up" form of planning. Most management tools are designed to support vertical organizations. Social action research is also part of a process designed to help horizontal partner networks plan for and manage their own performance.

The OSIII Web site will serve as an "Infrastructure for Results." It will be an interactive, robust "Web 2.0"[11] presence for the Oregon Benchmarks and its partners working to improve their communities. Along with a public media function, this new Web presence will help people to connect around shared goals and benchmarks; encourage statewide conversation and learning from local accomplishments; improve public policy; and improve the accessibility and usability of the state and county benchmark products. The enhanced Web site will require additional permanent staff to sustain the investment.

Project evaluation will identify measures and create data for all levels of the logic model shown in Appendix F. Data will be used to course-correct along the way and to guage success of the total effort at the conclusion of the project. Lessons learned will be written and posted for all to access.

Finally, ***project management*** is a critical work stream that keeps the other work streams on track and coordinated for best results. By tracking progress, creating checkpoints, communicating proactively with stakeholders, and supporting all work streams with public relations and communication activities, the project management effort will assure that tasks and products are delivered effectively, on time, and within budget.

See Appendix G for more detail on the work streams.

7. The Investment Required

Industry resources have submitted cost estimates on a goodwill basis to the Progress Board. Based on these estimates and other information, an estimated $2,389,526 will be needed for a two year period. This includes:

1. $346,000 from in-kind contributions and donations
2. $430,766 being requested from the 2009-11 and future state budgets as a permanent, ongoing expense to the state for sustaining the Oregon Shines III investment
3. $1,612,760 to be requested from foundations and other potential sponsors in and out of Oregon

The following table summarizes, by work stream, what the Oregon Shines III process will require to execute effectively over a two year period.

Budget detail by work stream can be found in Appendix H.

[11] Web 2.0 means a new generation of Web-based applications that are interactive and harness collective intelligence.

Two-Year Budget Summary for Oregon Shines III

Excludes $346,000 in-kind contributions and private donations shown in Budget Detail (Appendix H)

Work Streams and Deliverables	$ Required	Assumptions	In order to:
1. Public Engagement Attendance at 50 local meetings with local leaders across the state	117,860	Costs minimized by ALF Senior Fellows across Oregon serving as OSIII ambassadors	Raise awareness, enthusiasm and collaboration among local leaders around what is happening to increase benchmark progress in their areas and invite learning
2. Analysis Trends analysis and analysis of key drivers in selected policy areas such as education, human services, corrections and energy and emissions.	396,500	Megatrend analysis covered by OBC; systems dynamic modeling includes training to embed the capacity to adapt the model for ongoing use	Identify key challenges facing Oregon's future and better understand how progress happens at the systems level for key policy areas
3. Strategies, Benchmarks, Plan A few key cross-cutting strategies, updated benchmarks and an OSIII plan document	132,300	Work sessions professionally facilitated for a whole systems approach	Reach consensus on a key cross-cutting strategies, renew the benchmarks and capture the imagination of Oregonians with the OSIII plan document
4. Oregon Shines III Conversations Six rotating events between phases engaging Progress Board members, civic leaders, and local partners and elected officials	79,888	Costs minimized by ALF Senior Fellows with the assistance of a professional facilitator	Dialogue about what we are learning in Oregon Shines III, seeking input on the plan, the benchmarks and local engagement on next steps.
5. Study & Promote Local Benchmark Successes Identify, study and amply via Web and media benchmark-related accomplishments in communities	330,553	Professional trains volunteers and student interns on social action research	Understand local benchmark success in all three goal areas and in so doing, increase community engagement, collaboration, and well-being across the state.
6. Dynamic Web Presence Customized, on-line "Infrastructure for Results" that better meets the needs of community, program, legislative and government users	597,883	Licensing of collaboration tools covered by other state agencies, open source or existing contract	Evolve the current Web site to an interactive space featuring data and stories about benchmark-related accomplishments and where people with shared goals can connect and collaborate to improve their communities
7. Evaluation Neutral, professional assessment of whether OSIII was worth the investment	37,550	Performed by an independent, third-party evaluator	Assess the success of the OSIII project and make a learning history available online for the benefit of others
8. Project Management Oversight, planning and coordination, communication, public relations, progress checkpoints and reporting	350,992	PR costs minimized by working with interns & the Public Relations Society of America	Coordinate all work streams, proactively address any issues, and communicate consistently with stakeholders about results along the way
Total	**2,043,526**	*Excluding $346,000 in donations & contributions shown in Appendix H*	
Less plan writing and production Less two new, permanent OPB staff	-53,000 -377,766	Being requested in the state's 2009-11 budget	
NEW funding required	**$1,612,760**	**Additional support needed for two-year project period**	

What Continues Beyond The Oregon Shines III Execution Phase?

The work of Oregon Shines III will require ongoing resources and capacity.

Execution of the work-streams will take about two years and give Oregon several lasting benefits: planning tools that will help policy-makers identify areas of highest leverage and better anticipate long-term consequences of their actions; a dynamic, online Infrastructure for Results that fosters continuous learning and results-oriented collaboration; and a way to learn about and expand important local accomplishments. These exciting benefits will require new staff and enhanced, ongoing partnerships.

#	New Capability	What's Required	Strategy	Potential Partners
1	Systems dynamic modeling (Appendix E)	Maintenance of tool; operators for model; interest of policy-makers in the tool	Introduce the tool in Oregon Shines III, train local modelers and make the tool available for Oregon planning and policy making at state, regional and local levels.	The governor and legislative leadership Oregon universities interested in modeling teams Executive and legislative branch policy analysts and advisors
2	Collaborative Web presence - on-line "Infrastructure for Results"	Two additional staff for content management, media communication, online moderator and user inquiries	Train public in how to use; keep current and dynamic; assure ease of us. The Progress Board is seeking additional permanent staff in the state's 2009-11 budget cycle	The governor and legislative leaders Stakeholders from the private and independent sectors Web users
3	Social action research	Certification training, people in the field to listen and document. Formalize relationship with colleges to give credit for field training.	Train American Leadership Forum Senior Fellows and others in how to use this approach effectively. Invite journalism and social science students to participate. Dedicate part of a Progress Board FTE for ongoing work in this area.	Oregon colleges and universities with social science programs that are interested in social action research University of Oregon's Snowden Internship Program,

Appendix A. Oregon Shines III Partner Panels

Experts call for more collaboration and systems thinking.

The Progress Board completed an 18-month series of quarterly "partner panels" in which over 40 policy experts in and out of government shared their perspectives with the board on Oregon's most important issues going forward. A common theme emerged from all panels. In numerous ways, panelists tell us that Oregon *needs to invest in collaboration, systems thinking and prevention.*

- **Economy Partner Panel – April, 2006**
  The economy panel stressed that simultaneously advancing all three spheres—economy, community and environment—was crucial for Oregon to remain competitive in today's global economy.
- **Education Partner Panel – July 2006**
  The education panel used the word "systems" repeatedly and drove home the realization that Oregon's education, public safety and social support systems, for example, cannot be fixed independent of one another.
- **Health and Basic Needs Partner Panel – October 2006**
  Health and well-being panelists articulated in numerous ways that Oregon must prevent the root causes of problems. A culture of change is necessary across all sectors—private, public and independent—to work partnerships, as no single sector has the solution.
- **Public Safety Partner Panel – January 2007**
  Public safety highlighted the cross-system nature inherent in reducing recidivism. Released inmates, for example, need mental health treatment, alcohol and/or drug treatment, housing, and some level of income that won't lead them to commit crimes again.
- **Civic Engagement Partner Panel – April 2007**
  Civic engagement panelists stressed the need to bridge gaps and engage citizens in facilitated dialogue around Oregon.
- **Built Environment Partner Panel – July 2007**
  Built environment panelists laundry-listed many cross-systems issues. Safe drinking water, for example, affects jobs, state and local development, community health, education, and the environment. Transportation touches every benchmark and all goals of Oregon Shines. Health and healthcare access are influenced by an individual's access to housing. Housing prices are pushing people out of communities, stressing transportation systems and schools. For example, if a student moves three times over the course of their primary education, it is estimated that they lose a year of learning.
- **Natural Environment - October 2007**
  Oregon has not made progress on the key natural resource items laid out in OS and OSII. Previous Oregon Shines approaches have been silo specific and do not reveal the interconnections. It's not just a fish problem or water problem, it's interconnected. There is a huge job to do regarding critical environmental issues that the traditional silo approach is incapable of answering.

Appendix A, Oregon Shines III Partner Panels, continued

Partner panelists

ECONOMY
- Doris Penwell, Association of Oregon Counties
- Jim Azumano, Governor's Office
- Lynn Beaton, Oregon Economic and Community Development Department
- Lita Colligan, Governor's Office
- Duncan Wyse, Oregon Business Council

EDUCATION
- Sue Hildick, Chalkboard Project
- Renee Leger, Employers for Education Excellence
- Salam Noor, Oregon Department of Education
- George Pernsteiner, Oregon University System
- James Sager Governor's Office
- Duncan Wyse, Oregon Business Council

CIVIC ENGAGEMENT
- Wendy Radmacher-Willis, City Club of Portland
- Kent Snyder, American Leadership Forum
- Robin Teater, American Leadership Forum
- Joyce White, Grantmakers of Oregon and Southern Washington

HEALTH AND WELL-BEING
- Swati Adarkar, Children's Institute of Oregon
- Liz Baxter, Archimedes Movement
- Ben Boswell, Association of Oregon Counties
- Bob Nikkel, Department of Human Services
- Erinn Kelley-Siel, Governor's Office
- Mickey Serice, Department of Human Services
- Doug Stamm, Meyer Memorial Trust

PUBLIC SAFETY
- Martha Brooks, Fight Crime, Invest in Kids
- Eriks Gabliks, Public Safety Standards & Training
- Judge Darryl Larson
  Judicial Department
- Joe O'Leary, Governor's Office
- General Raymond Reese, Military Department
- Craig Prins, Criminal Justice Commission
- Max Williams, Oregon Department of Corrections

BUILT ENVIRONMENT
- Gail Achterman, Transportation Commissioner
- Janet Byrd, Housing Alliance
- Matt Garrett, Department of Transportation
- Rob Hallyburton, Land Conservation & Development
- Victor Merced, Housing & Community Development
- Ethan Seltzer, Portland State University
- Gail Shibley, Department of Health

NATURAL ENVIRONMENT
- Dave Morman, Oregon Department of Forestry
- Phil Ward, Oregon Department of Water Resources
- Steve Williams, Oregon Department of Fish and Wildlife
- Gail Achterman, Institute for Natural Resources
- Andrea Durbin, Oregon Environmental Council
- Angus Duncan, Bonneville Environmental Foundation
- Sara Vickerman, Defenders of Wildlife

Appendix B. Stakeholder Interviews

Based on responses to one question: "What elements or factors do you think are critical to include in our design for Oregon Shines III?"

Identified themes:

The nature of OSIII and Oregon Benchmarks

Sample comments:

- "Oregon Benchmarks are the centerpiece of Oregon Progress Board"
- "What would make OSIII more interesting to me would be some sort of model that shows the relationship between these benchmarks."
- "I hear that Oregon Benchmarks are not efforts but results. But sometimes efforts do matter. This is really hard stuff."
- "The original Oregon Benchmarks were organized in three major topics: people (human capital), place (environment and community characteristics) and economy. Oregon Shines II buried human capital by spreading the human capital benchmarks into its three broad categories -- economy, environment, safe caring communities."
- "There are so many Benchmarks they can be overwhelming. I don't understand a large number of them but there are a few that I do."
- "We should also explicitly call out climate change. This is where we specifically need Oregon Benchmarks."
- "As a legislator I am struggling to see how to use this."

Political leadership and accountability (power, influence to get results)

Sample comments:

- "We can do this organically vs. the command and control structure of the state"
- "One concern I had was that we had so many benchmarks that it was difficult to being pressure to bear to make sure that they were in the budget. Taking on a few would solve this."
- "…the OPB could be used in informing the legislature [not telling them what is important]. We need to make legislators more aware of the benchmarks."
- "Another element of the plan and implementation should be based on creating a learning community. There is a lot of "gotcha" going on or simply ignoring measures."
- "In my civic service I hear folks touting the success of their programs. But I find a disconnect between their claims of achievement to verifiable achievement."
- "I have high regard to the potentiality of OSIII but low regard for its success if the structure, communication and funding are not addressed fully."
- "We should shoot for the moon but be prepared for less. We need a contingency plan to make it happen with a core structure that's pretty simple." [referring to OSIII funding]

Appendix B. Stakeholder Interviews, continued

Engagement and ownership

Sample comments:

- "I'm concerned about town hall meetings where people who like to hear themselves talk can dominate."
- "We also have to figure out the role of citizens. Elected leaders are angsting over citizen engagement. . ."
- "People do like meetings, polling, etc. You can do that on the internet."
- "We must design a process that is relevant to the lives of a broad population of Oregonians. How can they better access the benchmarks? You can't assume everyone has an internet connection."
- "I am a big fan of the Oregon Progress Board but how do you get the implementers to participate fully? How do you get agencies to take Oregon Benchmarks seriously?"

Local community action

Sample Comments:

- "Strengthening local government is a key element"
- "Each community needs to fashion its own vision to reach its own potential"
- "I firmly believe that the future of our state lies in the efforts of our communities."
- "Putting myself in the community context and listening and understanding is critical."
- "Measures are just a vehicle to channel peoples' passions" [referring to the need to get out into communities]
- "If you could break a lot of the data down into county and city scales, it would be valuable because they can not afford the rigor of analysis."

Wide variation of opinion

See above

Simple language

Sample Comments:

- "Keep language simple, use plain English and be clear"
- "No techno-speak – be coherent."
- "It is real essential that we keep it simple with no jargon or buzzwords such as systems thinking."

Partnership and collaboration

Sample Comments:

- "I would like to learn more about others working in communities and this network would be good for us."
- "Where can we connect with other efforts so we don't compete with them?"
- "We need to get to use the Oregon Benchmarks and draw in all of our partners. I can't accomplish my measures because I do not have control over all of the partners involved."

Appendix B. Stakeholder Interviews, continued

The Progress Board gratefully acknowledges the time and input of the following interviewees.

Interviewees:

1) John Kitzhaber, Former Governor of Oregon
2) Tom Gallagher, Ford Institute for Community Building
3) Doug Stamm, Meyer Memorial Trust
4) Charlie Walker, Miller Foundation
5) Tim Nesbitt, Office of Governor Kulongoski
6) Mike McCauley, League of Oregon Cities
7) Mike McArthur, Association of Oregon Counties
8) Dawn Farr, Legislative Fiscal Office
9) Mickey Lansing, Commission on Children & Families
10) Pat Ackley, Ackley Associates*
11) Raymond Caballero, retired mayor, El Paso*
12) Sue Densmore, Sue Densmore Communication Strategies*
13) Sara Gelser, State Representative District 16*
14) Scott Harra, Director, Department of Administrative Services*
15) Joe Johnson, Oregon Community College Association*
16) Mike Jordan, Portland Metro*
17) John Miller, Wildwood, Inc.*
18) Frank Morse, Oregon Senator District 8*
19) Tom Potiowsky, Department of Administrative Services*
20) James Sager, Education & Workforce Policy*
21) Neil Bryant, Bryant Lovlien & Jarvis, PC
22) Dave Frohnmayer, President University of Oregon
23) Diane Snyder, US Endowment for Forestry and Communities
24) Bev Stein, Public Strategies Group, Inc.
25) Brett Wilcox, Laurus Energy and Summit Power Alternative Resources
26) Jeff Tryens, Consultant
27) Duncan Wyse, President Oregon Business Council
28) Jerry Kissler, Retired VP, University of California
29) Sue Hildick, The Chalkboard Project Foundation
30) Gail Achterman, Institute for Natural Resources
31) Wendy Radmacher-Willis, Oregon Solutions
32) Robin Teater, American Leadership Forum Oregon
33) Bruce Weber, OSU - Rural Studies Program
34) Barbara Sidway, Oregon 150
35) Bob Repine, Oregon Economic Development

* Current members of the Oregon Progress Board

Appendix C. Three Case Studies of Local Benchmark-Related Accomplishment

The following pages offer abbreviated case studies to illustrate some of the many types of local efforts that will be introduced in Oregon Shines III and linked to Oregon Benchmarks online (http://benchmarks.oregon.gov). They demonstrate collaboration and local entrepreneurial innovations that contribute to multiple benchmark areas. Their stories and data will be promoted in the media and in an enhanced, user-friendly Web site so that other communities, governments and foundations can learn from and be inspired by their accomplishments.

In these brief case studies, we tested our assumption that progress toward social, economic and environmental well-being occurs in local communities. At Rogue Community College, it occurs through the expansion of educational services to Jackson County students. Wallowa Resources is transforming a natural resource extraction economy to an economy based on restoration, entrepreneurship, and land management. Finally, Sequential Biofuels is a demonstration of Oregon's leadership in creating and consuming locally generated biofuels.

- **Rogue Community College increased enrollment from 2,000 to 12,000 students: page 27**
- **Wallowa Resources is transforming a resource extraction economy to one of restoration, entrepreneurship and land management: page 28**
- **SeQuential Biofuels offers the first biofuel fueling station in the Pacific Northwest and is expanding production without affecting food supply: page 29**

As different as these case studies are in subject and location, they reveal some commonalities that validate our assumptions:

- ✓ They are locally focused on improving life in their communities.
- ✓ They have a number of program and project measures that they use to constantly improve performance.
- ✓ Their accomplishments impact multiple Oregon Benchmarks.
- ✓ Their achievements are the result of collaboration across private, governmental, educational and not-for-profit organizations.

In all three instances, we found that the reflective process used in social action research co-inspired those involved and expanded the network of people, knowledge, ideas and energy surrounding the project. This confirms previous research that the process of social action research, itself, improves well-being and productivity.

A partial list of partners involved with each of these case studies and their goals, strategies and measures of progress are at www.oregon.gov/DAS/OPB/docs/OSIII/Oregon_ShinesIII_CaseStudies.doc.

Appendix C. Three Case Studies, continued

Rogue Community College increased enrollment from 2,000 to 12,000 students

When Harvey Bennett left LaGrande to become Rogue Community College's Dean of Instruction he claims that he had a "rock in m shoe". He couldn't understand why Jackson County residents were not being served by a community college. Doing so would take Harvey and many others over 12 years. Rogue Community College's expansion to include both Jackson and Josephine counties increased enrollment from 2,000 students to 12,000 students in a wide range of educational offerings.

The effort to expand Rogue Community College to Jackson County began in 1984. Cooperation was essential to solve many challenges to the project. How could a new college be established without threatening the enrollment and revenues of Southern Oregon College? In the post Measure 5 era, how could local school districts and Educational Service Districts not have their fixed tax base threatened? With the expansion of Rogue Community College to serve Jackson County how could the issue of debt service to Josephine County be addressed?

Ninety percent of voters approved the expansion in a special 1996 election. This was the result of a broad collaboration between Josephine and Jackson Counties. In 1988, Jackson and Josephine County worked with the National Civic League to research community issues. Sue Densmore describes how the Rogue Valley Civic League came about due to work being done by the National Civic League and the Oregon Progress Board. It was set up like a City Club where issues were researched before positions were taken. The League agreed that a community college was needed in Jackson County. A research team looked at of the funding issues, brought all of the effected parties together and developed a plan.

Rogue Community College now has three main campuses: the Redwood Campus in Grants Pass, the Table Rock Campus in White City and the Riverside Campus in Medford. It supports virtually every business in Jackson County by offering job training to their employees. The college has also partnered with social service agencies to prepare their clients for entry level jobs, resulting in a successful welfare to work program. The college also serves as a remedial center developing skills in people with 6th grade educations and bringing them to college levels.

Rick Levine became the President of Rogue Community College in 1999 and has worked with the Southern Oregon University president to create a joint facility which will allow students to move seamlessly through a four year program. This year, through a cooperative relationship with Oregon Institute of Technology, Southern Oregon University and Oregon State University, Rogue Community College offered $500,000 in scholarships.

Rogue Community College contributes to numerous Oregon Benchmarks, including employment in rural Oregon, pay per worker, unemployment, high school dropout and completion rates, adult literacy, labor force skills training and poverty.

Sources: Sue Densmore, Rick Levine, Harvey Bennett

Appendix C. Three Case Studies, continued

Wallowa Resources - transforming a resource extraction economy to one based on restoration, entrepreneurship and land management

Wallowa Resources and partners built this kiosk from small diameter roundwood. The building served as an information center at the 2002 Winter Olympics.

Saw mills in Enterprise closed in 1994 crippling the local economy. Unemployment grew, poverty increased, the tax base shrunk and schools closed one day per week in order to save costs. Over the next two years, the community began to hold meetings and decided that there probably would not be a return to the economy based on timber harvests as they had historically seen. This began a shift from an extraction based natural resource economy to a restoration and enhancement based natural economy. This was the beginning of Wallowa Resources, a not-for-profit organization aimed at promoting land and community stewardship.

The vision of Wallowa Resources is: "A region where all rural communities have access to the knowledge, resources, opportunities and services they need to secure their livelihoods and steward their landscapes. For the vision to be realized, people must have good jobs, quality education, decent and affordable housing and health care, access to capital and markets, and influence over the management of natural resources."

Their work requires the integration of social, economic and ecological issues to identify and implement strategies that will conserve cultural and biological diversity, promote sustainable use and ensure the fair distribution of benefits. It requires partnerships or collaborative relationships.

Wallowa Resources has three legs. The **Land Stewardship Division** is focused on: wetland conservation; removal of fish barriers (38 miles of native steelhead habitat); investment in critical roads and stream restoration (1,000's of acres of upper Joseph Creek); restoring hundreds of acres of Aspen habitat; noxious weed management; and fuel reduction in Wallowa Lake and Alder Slope where 58 landowners participated in treating 155 acres.

The **Wallowa Mountain Institute** is the research and educational component focused on promoting the understanding of landscapes in order to determine and communicate the best management practices. Outdoor Wallowa Learning (OWL) takes 4th-8th graders out for one week of outdoor education. WREN is a Friday school program serving 50 5th-7th graders this year. The HAWK is a high school apprenticeship program that prepares high school students for college. Several universities collaborate with the Institute on applied community based research.

Community Solutions Incorporated (CSI) is the for profit arm of Wallowa Resources providing capital, business services and knowledge to create and support businesses that benefit the community and the environment. Wallowa Resources successfully started and sold a small post and pole business (Community Smallwood Solutions). Six months later CSI had assembled an impressive portfolio including: campground management, small scale micro hydro, a feasibility study for forest products industry in Baker County, a feasibility study for biomass cogeneration, an expansion of JayZee lumber and exploration of funding for financing residential solar projects. Through government contracts, CSI supports 45-50 contractors working on restoration jobs and earning family wages.

Wallowa Resources contributes to over 20 Oregon Benchmarks, including employment in rural oregon, research and development, poverty, per capita income and many environmental benchmarks. More information on the benchmarks can be found at http://benchmarks.oregon.gov.

Sources: Diane Snyder, Brinda Stanley, Nils Christoffersen, Ben Henson, www.wallowaresources.org/

Appendix C. Three Case Studies, continued

SeQuential Biofuel Station - the first all-biofuel and biofuel blend fueling station in the Pacific Northwest, expanding production without affecting food supply

Around the world today there is an ongoing debate about the use food stock for biofuels. Biodiesel offers an alternative by processing used cooking oil. While used cooking oil used to go to Southeast Asia for animal feed, in Oregon it is used by SeQuential to produce one million gallons per year of biodiesel.

SeQuential Biofuels started in 2000 when students Ian Hill and Tomas Endicott began home brewing biodiesel in their garage in Eugene. Their experience motivated them to go into business. In 2004 the company entered into a joint venture with Pacific Biodiesel Company in Hawaii to build Oregon's first commercial biodiesel production facility in Salem. Investors included country music star Willie Nelson, Ron Tyree of Tyree Oil in Eugene, Cameron Healy of Kettle Foods and John and Susan Miller, sustainability developers in Salem.

SeQuential Biofuels is now expanding its production capabilities. It plans to increase its processing plant and production from one to five million gallons per year. This will require an expansion of feedstock. Plans are underway for SeQuential Biofuels to acquire Encore Oils to collect waste oils from restaurants as well as using virgin seed oil from the Pacific Northwest.

Oregon's infrastructure for creating biofuels operates as a closed recycle system. For example, the City of Portland offers a set price to Eastern Oregon Farmers for seed oil stock. SeQuential Biofuels then processes the feedstock into biodiesel and sells it back to Portland for a fixed processing price. The city will use the biodiesel to power trucks to transport bio-sludge to the Eastern Oregon farmers for fertilizing their crops. Another recycling example is Burgerville, which plans to purchase oil grown in Oregon and then recycle it into biofuels.

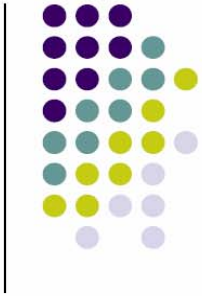
SeQuential's flagship station is located in Eugene where the prices for biodiesel are less expensive than they are elsewhere because of its used cooking oil feedstock. The SeQuential station is located on a site that was occupied by a gas station, which contaminated the soil and groundwaters with petroleum hydrocarbons. SeQuential collaborated with Oregon's Department of Environmental Quality, Oregon Economic Development and Lane County, paying $50,000 to clean up the site. The community supported the effort.

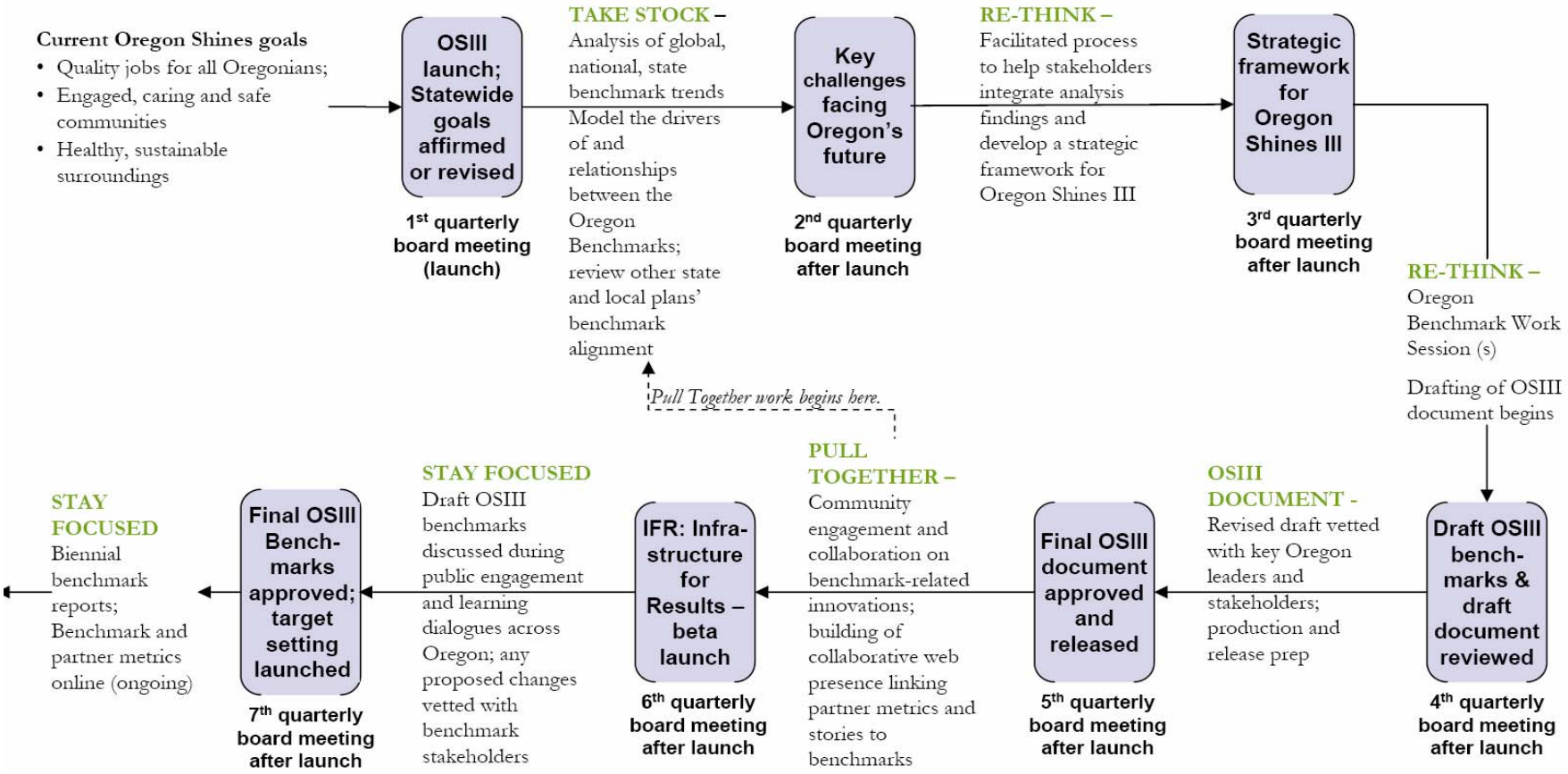
The SeQuential station has many sustainable features, including passive solar architecture, a living roof, a solar roof and a bios wale (landscape elements designed to remove silt and pollution from surface runoff water) that reduces energy usage and filters water runoff. SeQuential has saved 78,733 lbs of CO2 since it was built and generated over 65,502 kWh in electricity.

SeQuential impacts at least seven Oregon Benchmarks: employment, economic diversification, venture capital investments, volunteering, feeling of community, air quality and carbon dioxide emissions. More information on these benchmarks can be found at http://benchmarks.oregon.gov.

Sources: Ian Hill, http://www.sqbiofuels.com/index.html and Tim Christie's article for the Register Guard, "For biodiesel enthusiasts, the gas is always greener." (6/22/08)

Oregon Progress Board Key Decision Overview and Timeline for Oregon Shines III





Appendix E. Systems Dynamic Modeling: "T21"

System dynamic modeling is recommended for the Take Stock phase to better understand key, cross-cutting, high-leverage drivers in complex policy areas such as education, human services or corrections, and to better anticipate the long-term consequences of policy decisions and actions.

Developed at MIT, this is a collaborative tool for comprehensive, societal planning. It has a framework identical to the Progress Board's three spheres: economic, social and environmental well-being.

What Can T21 Do?

The most important application of T21 is contributing to societal-level planning processes.

T21 is a valuable tool for conducting stakeholder consultations, producing strategy documents, producing data and analyses and monitoring and evaluating plans.

T21 includes the critical features that support an inclusive, comprehensive, and integrated development planning process. It is transparent, collaborative, robust, and customizable.

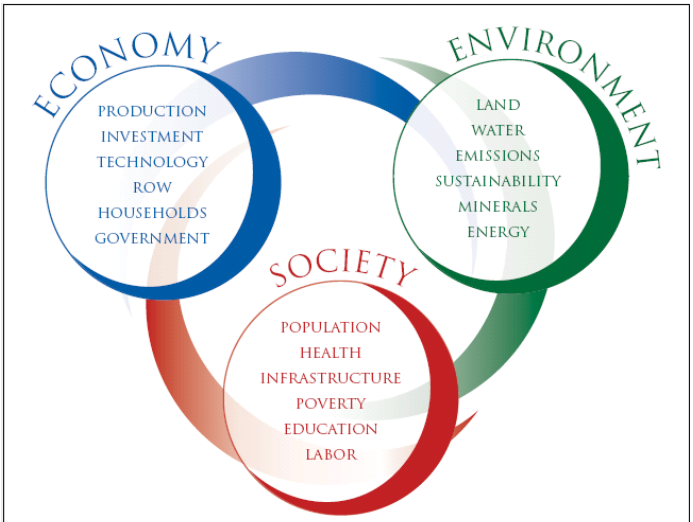


Figure 1

For more information, please see:

An Overview of the T21 model (four pages, pdf)
http://www.millenniuminstitute.net/resources/elibrary/papers/T21Overview.pdf

A General Introduction to the T21 Model (two pages, pdf)
http://www.millenniuminstitute.net/resources/elibrary/papers/T21brief_general.pdf

A Technical Introduction to the T21 Model (two pages, pdf)
http://www.millenniuminstitute.net/resources/elibrary/papers/T21brief_technical.pdf

Source: The Millennium Institute, a not-for-profit organization
http://www.millenniuminstitute.net/

Appendix F. Oregon Shines III Logic Model

Purpose Why do an OSIII process	**To accelerate Oregon's progress *simultaneously* toward three goals:** • Economic well-being: Quality jobs for all Oregonians • Social well-being: Engaged, caring and safe communities • Environmental well-being: Healthy, sustainable surroundings				
Goals What the OSIII process aspires to accomplish	**Take Stock Ph.** Public awareness of the challenges affecting Oregon's future and better understanding of how progress happens across all goal areas (ORS 285A.150)	**Re-think Phase** A strategic plan that captures the imagination of all Oregonians and benchmarks that accurately gauge Oregon's progress. (ORS 285A.150, 162, 168)	**Pull Together Phase** Engaged citizens and communities Informed policy-makers, investors and partners Better government policy and results (ORS 285A.162, 165, 174)		**Stay Focused Phase** Stay focused on the goals of Oregon Shines and how progress is being made
Strategies How OSIII will be focused	Collaborative data analysis and dialogue; provide facilitation, tools & methods to help stakeholders see the whole system	Professional facilitation and writing; vetting the plan and benchmarks with stakeholders across Oregon.	Local input on the priorities and benchmarks Study and promote local benchmark accomplishments	Web site where people can connect to improve their communities and their governments, linking state and local partner performance to the Oregon Benchmarks	Continually report state's benchmark progress Build partnerships and invest in additional resources
Tactics Specifics on how strategy will execute *(WS = work streams)*	*WS #2* - Analyze global, national and state benchmark and other trends and determine the key challenges facing Oregon's future - Using a whole systems approach and tools, work with stakeholders to identify high-leverage drivers for making progress	*WS #3, 4* - Synthesize findings from analysis into Oregon Shines III priorities, strategies and updated Oregon Benchmarks - Write, vet and publish the Oregon Shines III plan document - Finalize the benchmarks after receiving and integrating local feedback from around the state	*WS #1, 4, 5, 8* - 50 public engagement meetings - 24 case studies of local benchmark accomplishments using social action research - Six Oregon Shines III Conversations across state - Public media and outreach	*WS #6* - Link statewide plan and state agency work to the benchmarks - Link local benchmark accomplishments to the benchmarks - Improve county data benchmark tools - Link state and local context data to the benchmarks - Add online collaboration tools for shared learning and coordinated action - Incorporate Oregon 150 content	*WS #8* - Biennial benchmark reports, online report generator, county data products, & race & ethnicity reports - Partnerships with universities to sustain social action research and to keep systems tools available to policy-makers & communities - Add staff to sustain Web investment
Outcomes Was OSIII successful? (Evaluation measures to be developed as a part of WS #7)	- Key challenges facing Oregon's future - Systems tools are available to policy-makers, all levels	- Oregon Shines III priorities and strategies for achieving the goals - Draft Oregon Benchmarks, with a focus on key benchmarks - Oregon Shines III document	- Communities engaged and owning the Oregon Benchmarks - Elected officials and governments learn from local community benchmark accomplishments	- Online Infrastructure for Results (IFR) providing goals, strategies & measures of state and local benchmark partners - More strategic public and private investments - Partners connecting to improve benchmark progress	- Continuous learning from state and local performance data, including benchmark reports - Web site investment is sustained

Appendix G. Work Stream Detail

1. Public engagement (all phases)

Objective: To raise awareness and build enthusiasm and collaboration among local civic and legislative leaders about what is happening to increase progress within their own districts and communities; to invite learning from each other

- Leverage participation of American Leadership Forum (ALF) Senior Fellows and other partners, training them first in OSIII design and approach.
- Schedule time onto agendas of existing regional and association meetings of non-profit organizations, local elected officials, government program regional meetings, and civic and business leaders. Examples: county commissioners district meetings, Special Districts Association meetings, Ford Institute regional conferences and city clubs
- Once scheduled into these forums, listen and learn about local issues and how OSIII and the benchmarks relate to local areas; build understanding by putting OSIII into the audience's context.
- Invite communities to open their doors to participate in understanding what is already working and that can be expanded.
- Prepare summary of discussion, contacts and follow-up actions for each meeting.

Partners to engage: American Leadership Forum (ALF); Ford Family Foundation - Ford Institute, OSU Extension Service; Association of Oregon Counties, League of Oregon Cities; Rural Development Initiative; special district leaders; chambers of commerce; city clubs; Oregon Community Foundation Regional Leadership Councils.

2. Analysis (Take Stock phase)

Objective: To identify key challenges facing Oregon's future and better understand how progress happens across all three goal areas

- Analysis of key challenges facing Oregon's future
  - ✓ Collaborate with Oregon Business Council (OBC) on a mega-trend analysis
  - ✓ Integrate mega-trend analysis, rural studies, environmental assessments and other state and local plans
- Facilitated process to model the relationships between Oregon Benchmarks and their "drivers" using systems dynamic modeling or alternative approaches
  - ✓ Involve stakeholders in all steps
  - ✓ Build the view of the current picture across government structures and systems
  - ✓ Validate how system works with data (data mining, plug in data, data outputs)
  - ✓ Reflect and dialogue to understand intended as well as unintended consequences of current state
  - ✓ Identify key levers across the benchmark areas
  - ✓ Create future "what if" scenarios based on stakeholder input and interest (e.g., transportation, human services, corrections and/or education)
  - ✓ Engage universities in building and maintaining the model for future use

Appendix G. Work Stream Detail, continued

- Post simplified model for on-line web presence, available to legislators and citizens to use and increase understanding of leverage for local action

Partners to engage: Oregon Business Council; OSU Rural Studies Program; Institute for Natural Resources; OSU Extension Service; PSU Urban Studies Program; Division of Budget and Management; state agencies, advocacy organizations and other stakeholders

3. Updating the Benchmarks and Producing the Plan (Re-Think phase)

Objective: A compelling OSIII strategic plan that captures the imagination of all Oregonians and Oregon Benchmarks that better gauge Oregon's progress

- Facilitate a process that synthesizes information from the analysis into priorities for Oregon Shines III; a strategic framework for achieving the goals; and updated benchmarks to better gauge Oregon's progress
- Write the plan to reflect priorities, goals, key drivers, strategic framework and updated benchmarks with captivating, easy to read narrative
- Vet the plan and updated benchmarks with involved stakeholders, governor, legislative leadership and the Progress Board
- Publish the plan, publicly release and distribute
- Integrate the plan into other work streams
- Finalize revised Oregon Benchmarks after Oregon Shines III conversations are completed (work stream #6)

Partners to engage: Governor, legislature, policy stakeholders, media, state agencies, advocacy organizations and other stakeholders across key policy areas

4. Six Oregon Shines III Conversations (between phases)*

Objective: To dialogue about what we are learning in the OSIII process, seek input on the benchmarks and local engagement on next steps.

- Schedule six events, rotating around the state to be held at transition points between phases (one reserved for an elite group of state leaders and political candidates)
- Select venue, handle meeting logistics
- Coordinate calendars; inviting Progress Board members, partner panel members, and others including local youth to be part of the sessions
- Prepare agenda around OSIII learning to date, choose appropriate facilitation. Choose and highlight a success story from the local area as part of the dialogue session. Invite those involved in the success story to attend and be part of the "reflect and learn" experience.
- Facilitate the meetings to optimize reflection and learning; engage participants on local and statewide next steps

Partners to engage: Local elected officials**,** partner panel members, ALF Senior Fellows, Ford Family Foundation - Ford Institute, Rural Development Initiative, Oregon Community Foundation Regional Leadership Councils, youth leaders from each location

Appendix G. Work Stream Detail, continued

5. Study and Promote Local Benchmark Successes (Rethink, Pull Together, and Stay Focused phases)

Objective: To study successful local benchmark-related performance across all goal areas and in so doing, increase engagement, collaboration, and well-being across the state.

- Respond to requests from Public Engagement work stream to visit local communities
- Identify progress being made in local communities and government programs
- Invite legislators to participate with researchers in learning about community action, innovation and benchmark-related accomplishments in their respective districts
- Train volunteer researchers/writers on this process (e.g. ALF, journalism & social science students)
- Study that progress preferably through in-person interviews
- Understand how that progress happens and how it is measured
- Document that understanding
- Publish stories and success measures on the collaborative Web site
- Engage public media to spread the stories
- Engage youth and universities as much as possible in all facets, including findings from the Oregon 150 Youth Symposium (Summer 2009)

Partners to engage: Local elected and community leaders, Ford Family Foundation - Ford Institute, Rural Development Initiative, Oregon Thrives, University of Oregon, ALF

6. Dynamic Web Presence (Pull Together and Stay Focused phases)

Objective: To create an "infrastructure for results" that evolves the current Web site to an on-line, interactive space where benchmark-related innovations can be recorded via stories and data reporting; where people of like interest can connect and collaborate on improving their communities

- Complete requirements planning for new, dynamic and collaborative Web presence building on past Web improvements and enhancing state agency – Oregon Benchmark key performance measure linkages
- Complete use cases for Web site, including foundations, agency, legislative, and local community views. Preliminary work suggest the Web presence include:
  - ✓ Enhance online benchmark report generator and state government linkages
  - ✓ Improve and add new county data benchmark visualization and tools (automatically updated slide shows, maps, etc.)
  - ✓ Link state and local context data to the benchmarks
  - ✓ Enhance and make more visible local partner contributions to the benchmarks
  - ✓ Add online collaboration tools for shared learning and coordinated action
  - ✓ Incorporate Oregon 150 content (Oregon Stories, Dreamers' Blog, etc)
  - ✓ Easy to use, quick access views of Oregon benchmark data for legislators and state agencies to use in decision-making

Appendix G. Work Stream Detail, continued

- Select vendor(s) to complete the work
- Build the Web solution, leveraging existing assets like OR150 Web elements
- Test proto-type and release version 1.0
- Collect learning and feedback from initial release, plan improved releases every six months for 18-24 months until platform has met the majority of user needs.
- Establish and staff an on-going content and technology support plan

Partners to engage: Enterprise Information Strategy and Policy Division (Oregon Department of Administrative Services), Oregon Explorer (OSU), and existing and users such as foundations, OR150, Oregon Thrives, Oregon Business Council, counties, and community partners

7. Evaluation & Continuous Improvement (Rethink, Pull Together, and Stay Focused phases)

Objective: To evaluate OSIII project results and make those available for others

- Develop specific measures for OSIII accomplishment areas
- Evaluate success against anticipated accomplishments
- Evaluate at each phase, making adjustments to strategies and design as needed
- Publish an OSIII "learning history" on Web site; distribute as appropriate
- Be available to share the journey of OSIII with others (e.g. other states, researchers)

8. Project Management (all phases)

Objective: To coordinate all work streams across the OSIII project, proactively address any issues, and communicate consistently with stakeholders about results along the way

- Maintain a project map of all OSIII activities and update on a weekly basis
- Track the work plan for all work streams; proactively identify and address "red flags" to project completion and escalating issues as necessary
- Create and implement an ongoing communication and public relations strategy
- Coordinate the scheduling and logistics of key events
- Report project results at designated checkpoints for the Progress Board and others
- Evaluate OSIII success against anticipated accomplishments
- Prepare updates to the Progress Board, foundations and other sponsors

Appendix H. Two-Year Budget Detail by Work Stream

Italicized rows indicate costs donated through outside sponsors or in-kind contributions. In-kind estimates include benefits and overhead.
Contract and OPB staff estimates are for two-year equivalents unless otherwise indicated (e.g. the equivalent of .1 FTE for the entire project).

Work Stream Detail (Work streams overlap in time.)	Cost	Contract Staff	OPB Staff	Notes	Total	*In-kind & donations*	Total less donations
1. Public Engagement (~24 months)							
ALF coordination	59,500			ALF-Oregon staff support & travel (donation to ALF)			
Calendar coordination	40,000	0.5		Contracted administrative assistant			
Training ALF senior fellows	9,000			Consultant - lead trainer & technology for 3 trainings			
Miscellaneous	9,360			Mileage, parking, printing, etc.	**117,860**		**117,860**
2. Analysis (~3 months)							
Trend analysis - key challenges facing Oregon	*40,000*			*Donated by OR Business Council & volunteer partners (estimated)*			
Scan of government plans - benchmark alignment	*20,000*			*Donated by private individual*			
Trend analysis support	*9,750*		*0.1*	*In-kind: OPB Data Analyst*			
Systems dynamic model development for Oregon	250,000			Consultant - systems dynamic modeler			
Systems dynamic model training for Oregon modelers	50,000			Consultant - systems dynamic modeler			
Facilitation of analysis meetings	55,000			Consultant - facilitator with systems expertise			
Business Analyst	40,000			Consultant - assistance for analysis & presentations			
Miscellaneous	1,500			Meeting space, food, parking, photocopies, etc.	**466,250**	*69,750*	**396,500**
3. Update Benchmarks/ OSIII Plan Document (~6 months)							
Benchmark update	*39,000*		*0.2*	*In-kind: OPB Data Analyst*			
Benchmark update	50,000	0.5		Contract data analyst - one year			
Benchmark update design, facilitation	26,000			Consultant with systems expertise*			
Miscellaneous.	3,300			Mileage, food, parking			
Writer	38,000			Consultant - professional writer			
Printing & distribution	15,000			State P&D - assumes 1000 copies, 30 pages, color	**171,300**	*39,000*	**132,300**
4. Oregon Shines III Conversations (six rotating across Oregon between phases)							
Meeting coordination and logistics	20,000	0.3		Contracted administrative assistant			
Co-facilitator (with ALF) - six sessions	26,500			Consultant with systems expertise*			
Media press release	18,888		0.1	New, permanent communications staff person			
Travel expenses	13,500			Mileage, some hotel for board members			
Miscellaneous	1,000			Meeting materials and other expenses	**79,888**		**79,888**
5. Study and Promote Local Benchmark Successes (~18 months and ongoing)							
Social action research	235,000			Lead consultant for training, documenting, writing & student/university outreach			
Coordination/logistics for volunteers & all meetings	20,000	0.3		Contracted administrative assistant			
Story editor and Web content management	75,553		0.4	New, permanent communications staff person	**330,553**		**330,553**

Appendix H. Two-year Budget Detail by Work Stream, continued

Work Stream Detail (Work streams overlap in time.)	Cost	Contract Staff	OPB Staff	Notes	Total	*In-kind & donations*	Total less donations
6. Web Presence/ Infrastructure for Results (18 months and ongoing)							
Design enhanced web site for collaboration	27,000			Consultant to design enhanced Web presence			
Web development & content management	200,000			Consultant to customize collaboration tools for OSIII Web			
Data automation & visualization	150,000			Consultant to improve online data visualization quality			
On-line Web support and moderator	188,883		1.0	New, permanent Web staff person			
Project Management	32,000			Contracted Web coordinator 6 mo/ 10 hours/week			
Web development assistance	*9,750*		*0.1*	*In-kind: OPB Data Analyst*	**607,633**	*9,750*	**597,883**
7. Evaluation (18 months)							
Develop measures, evaluate success, publish report	35,000			Consultant for independent third party evaluation			
Miscellaneous.	2,550			Travel - see quote for assumptions	**37,550**		**37,550**
8. Project Management (18 months)							
Maintain project map & track work plan	78,500	0.5		Contracted - .5 project manager for 1.5 years			
Communication & PR activities	94,442		0.5	New, permanent communications staff (coordinate with PRSA)			
Leverage expertise of PSRA and student interns	50,000			Partnership with Public Relations Society of America			
Coordinate key events	20,000	0.3		Contracted administrative assistant			
Compile and report project results	39,250	0.3		Contracted - .25 project manager for 1.5 years			
Evaluate project success against measures	39,250	0.3		Contracted - .25 project manager for 1.5 years			
Prepare presentations & updates to sponsors	20,000			Consultant - assistance for analysis & presentations			
Travel for OPB Executive Director	9,550			Local community and professional travel	**350,992**		**350,992**
Oversight of and involvement with all work streams	*227,500*		*0.7*	*In-kind: OPB Executive Director*	**227,500**	*227,500*	**0**
TOTAL investment over 24 month period	**2,162,026**	2.8	2.3		**2,389,526**	*346,000*	**2,043,526**
Less amount requested from state's 2009-11 budget							
- OSIII document writing and production							53,000
- Salary and overhead for 2 new FTE							377,766
TOTAL investment sought from NGOs							**1,612,760**