

Introduction

This document serves as a supplement to the LA HRTC Outreach and Engagement Process Map. It contains additional details about proposed planning and outreach and engagement activities between October 2023 and June 2024 to support LA HRTC members as they are on-boarded and begin their collective work.

Initial recommendations for planning and engagement activities were developed after completing four sessions with LA HRTC personnel in August and early September 2023 (during the election period). As such, and by design, the initial draft contains assumptions. New developments after September 2023 should be evaluated and considered for inclusion via updating the LA HRTC Outreach and Engagement Process Map.

Where applicable, best practices and examples have been included to further illustrate concepts. Again, all sections should be reviewed and updated as additional LA HRTC members begin to meet regularly and key planning decisions are finalized.

Format and Intended Use

Like the process map, this document is divided into four sections (Prepare, Share, Co-Create, Adopt), with each section representing a step of a draft outreach and engagement process. The use of steps is recommended to bring focus to the work at different points in time and to build a shared language when communicating about the project.

This document is designed to be referenced while reviewing the process map slides and to provide additional contextual information for each numbered task included in the process map, including:

- A proposed date range that takes major project milestones into consideration. It is recommended that specific start/end dates are assigned as soon as possible, including determining if some tasks can be moved up in the timeline based on available resources.
- A suggested owner based on information shared regarding LA HRTC roles and responsibilities
- A rationale for including the task at a given point in the process, along with guiding questions or examples to support decision making and implementation.

The first slide of the process map is an overview of the entire process. This is intended to serve as an introduction, an anchor, to help LA HRTC members orient themselves to the different steps and major planning and outreach/engagement activities within each step. The bullet points in this overview slide should also be updated as planning decisions are finalized, including the addition of links to online resources (i.e., documents, videos, meeting notices) as they become available.

If printing the process map, it is recommended to set printer settings to “scale to fit” in order to print on standard letter-size paper. The map can also be printed on 11 x 17 paper.

**LA HRTC CERF Outreach and Engagement Process Map
Supplemental Narrative**

STEP 1: PREPARE

(October - December 2023)

Focus: Develop relationships and tools to sustain LA HRTC’s equity-focused outreach and engagement work across Los Angeles County

When	Major Task	Who’s Involved	Rationale & Recommendation
Early October	1. Set up Collaboration / Data Collection Software	<u>Owner:</u> LAEDC Admin staff	<p>Data and information systems beyond email are recommended to distribute information to 300+ organizations as well as collect information from LA HRTC membership and LA County community members. LAEDC has indicated this will be decided in collaboration with the capacity-building consultant. Recommended functionality includes:</p> <ul style="list-style-type: none"> • Online survey and form design and administration. Google Suite Forms or Microsoft 365 Forms both support basic logic for community data collection and submission of LA HRTC administrative information. Review these options first. Popular survey applications (at varying price points) that support advanced logic and reporting include Alchemer, SurveyMonkey, and Qualtrics • Permission-based digital folders within a central resource repository for Affinity Leads and SPA-based Micro Grantees to view, upload, or store project documents. Additional general folders can hold administrative templates, procedures, etc. Either Google Workspace or Microsoft 365 can meet this requirement • Ability to efficiently share the same or different documents with numerous people. • Ability to support online document collaboration (adding content or comments to shared documents, linking documents, etc). Either Google Workspace or Microsoft 365 can meet this requirement.
October – Early November	2. Create and Release LA HRTC Introductory Video	<u>Owner:</u> LAEDC Communications Staff <u>Review by:</u> Steering Committee	Short (2-3 minute) video(s) showcasing a cross-section of LA HRTC membership can be an efficient and personable outreach tool to share goals and timelines as well as how the public can become involved through a call to action. Be sure to produce multilingual versions and/or include subtitles in all public-facing materials. See OurCounty Introductory video as a sample.
October	3. Plan & Deliver LA HRTC Capacity Training and Workshop(s)	<u>Owner:</u> LA HRTC Capacity Building Consultant <u>Review by:</u> Steering Committee <u>Participants:</u> All LA HRTC	<p>Developing a common purpose and shared practices can help to foster strong relationships, maintain momentum, and overcome challenges as LA HRTC members collaborate at table meetings and community-based dialogue across LA County: At least one workshop is recommended; more if time allows. Potential topics include:</p> <ul style="list-style-type: none"> • What shared norms do we collectively agree to promote and uphold through this process and with the public? • What does authentic dialogue-based engagement look like in our communities? • What does “meeting community members where they are at” look like in practice? • What are the monthly administrative tasks that LA HRTC members must complete to ensure compliance with the CERF grant?

STEP 1: PREPARE

(October - December 2023)

Focus: Develop relationships and tools to sustain LA HRTC’s equity-focused outreach and engagement work across Los Angeles County

When	Major Task	Who’s Involved	Rationale & Recommendation
October - November	4. Create tables, micrograntees, and a simple SPA-based Micro Grantee Community Engagement Toolkit	<u>Owner:</u> Affinity and Table Leads / LAEDC Communications and Admin team <u>Review by:</u> Steering Committee	<p>It is common for regional planning initiatives to develop an Engagement Toolkit, or supplemental set of resources to support those who gather information and feedback within the community. It is recommended that the Affinity Hub and Table Leads collaboratively develop a concise toolkit that is based on project goals and the outcomes of the capacity building training and workshops to guide the shared work ahead. Ideas for toolkit content include:</p> <ul style="list-style-type: none"> ● Definitions and norms for LA HRTC community outreach and engagement - promises to the community ● Shared, practical strategies for building relationships, particularly within disinvested communities ● A variety of basic outreach and engagement tactic templates/protocols/worksheets that SPA-based micro grantees will use for completing upcoming planning tasks and/or gathering feedback. Use of shared templates provide flexibility but help to ensure data is collected in a consistent manner (this section would be developed/added to over time) ● Instructions on how to submit data collected from community members via paper forms for compilation and analysis in online platform ● Instructions on how to submit administrative information via online forms or document upload (to support efficient processing of monthly reports, invoices, etc.)
October - Early November	5. Confirm Data Collection Plan for Economic, Health, and Climate Reports	<u>Owner:</u> External Researchers in coordination with LAEDC Research Analyst <u>Review by:</u> Steering Committee	<p>Because of tight report development timelines, it will be necessary to quickly confirm the specific data that external researchers seek to collect from LA County community members in October/November (current timeline assumes researchers begin work by October 20, 2023). Developing a data collection plan can help mitigate against overlapping data collection efforts and incomplete data within the reports.</p> <p>A data collection plan is a detailed internal document (usually a spreadsheet) that outlines exact steps to collect specific data, generally including:</p> <ul style="list-style-type: none"> ● Specific measure definition and calculation for each metric ● How will the data be collected (sampling methods, tools, and by whom) ● Timeline for data collection to meet reporting deliverables ● Any related reporting requirements for the data (visualization, disaggregation, etc.) <p>Since the external researchers have eight weeks to generate three comprehensive reports, collecting and incorporating qualitative data across all affinity areas within this timeframe may pose timing challenges. To mitigate this risk, narrow initial data collection within disinvested communities to outreach (i.e., shorter, online, phone and/or paper surveys), and then focus on in-depth dialogue and qualitative data collection activities during the SHARE step.</p> <p>The external researchers may have submitted a data collection plan in their proposal. Build from this, if available.</p>

STEP 1: PREPARE

(October - December 2023)

Focus: Develop relationships and tools to sustain LA HRTC’s equity-focused outreach and engagement work across Los Angeles County

When	Major Task	Who’s Involved	Rationale & Recommendation
Early November	6. Design Reports to Support LA HRTC Community Learning & Dialogue	<u>Owner:</u> External Researchers in coordination with Steering Committee	<p>While the economic, health, and climate report requirements were defined within the RFPs, there may still be an opportunity to align the final report format so that it specifically supports data analysis and dialogue. One idea is to design the reports as a series of short, visual briefs that incorporate elements of a data inquiry protocol.</p> <p>A data inquiry protocol is a structured process for examining data to identify patterns, trends, and relationships. It is a collaborative process that involves asking questions, making observations, and sharing insights. There are many different data inquiry protocols (see sample in Major Task #12) , but they share some common features, such as:</p> <ul style="list-style-type: none"> • Summary of key questions to be answered by each data set(s). For example, what specific questions will LA HRTC be able to understand or answer after studying the CERF Regional Index? • Prepare and visualize the data so that it can be collaboratively analyzed with easy to read titles and simpler visualizations keeping in mind that knowledge, literacy skills, and English proficiency may vary widely among LA HRTC membership and broader community members. • Describe the data by offering clear summary statements on what can be observed from the data. • Offer a few, short key findings that interpret the data along with proposed discussion questions that could serve as prompts for further analysis
Mid - November	7. Develop and Launch Data Collection Instrument(s)	<u>Owner:</u> External Researchers in coordination with LAEDC Research Analyst <u>Review by:</u> Steering Committee	Once specific measures are defined in a data collection plan, the external researchers and LAEDC Research Analyst can collaborate as needed to develop and launch the specific data collection instrument(s) for gathering community data for the three reports. This should include proactive communication and instructions as part of the Engagement Toolkit if the external researchers seek help from the SPA-based Micro Grantees with data collection based on the sampling methods they select.
Mid-November – Early December	8. Conduct Community Kick off Events and Initial Data Collection	<u>Owner:</u> SPA-based Micro Grantees <u>Support By:</u> Affinity and Table Leads	The SPA-based Micro Grantees can begin to get the word out about the LA HRTC goals as well as potentially support initial data collection (see Major Task #7 above). While the specific type of community kick off event should be guided by resources within the Engagement Toolkit, more informal and authentic opportunities for discussion with community members are recommended. Use of an LA HRTC introductory video, if available, could support kick off events too.

**LA HRTC CERF Outreach and Engagement Process Map
Supplemental Narrative**

STEP 1: PREPARE

(October - December 2023)

Focus: Develop relationships and tools to sustain LA HRTC’s equity-focused outreach and engagement work across Los Angeles County

When	Major Task	Who’s Involved	Rationale & Recommendation
December	9. Create Community Asset Lists/Maps	<u>Owner:</u> SPA-based Micro Grantees <u>Support By:</u> Affinity and Table Leads	SPA-based Micro Grantees are responsible for gathering and synthesizing community input within their thematic and service planning areas. Community asset lists or maps are a good tool to help identify community members/groups as well as identify related efforts in the community that are also underway. Asset Lists/Maps can be created in a variety of ways, but recommended content includes the following for each group or individual with whom the Micro Grantees hope to share information with or involve in LA HRTC discussions or events <ul style="list-style-type: none"> ● Name and contact information (phone/email/ways they can be contacted if no phone/email) ● Area of interest / knowledge / expertise ● Specific questions of interest to ask / learn more about from this person/group ● Specific inclusive and culturally responsive ways to connect with this person/group based on their specific needs/context ● Any support that would help reach each group or individual (i.e., translated resources, digital versus paper resources, stipends/incentives).
Late December	10. Deliver Research Reports to LA HRTC	<u>Owner:</u> External Researchers <u>Review by:</u> Steering Committee	The external researchers should provide their final report deliverables to the Steering Committee to confirm that the agreed upon report format was met for the submission to the State of California and for supporting Data & Dialogue table events.
End of December	11. Submit Research Report and Regional Plan Part I	<u>Owner:</u> Steering Committee in collaboration with LAEDC Admin staff	Required CERF Milestone based on important dates timeline on lacerf.org (last accessed 9/22/2023)

**LA HRTC CERF Outreach and Engagement Process Map
Supplemental Narrative**

STEP 2: SHARE

(January - February 2024)

Focus: Build shared understanding of needs across LA County disinvested communities through learning, data analysis, and dialogue

When	Major Task	Who's Involved	Rationale & Recommendation
Early January	12. Host LA HRTC Data & Dialogue Tables	<u>Owner:</u> LAEDC with facilitation by External Researchers or external partner	<p>Rather than analyzing the reports in isolated groups, maintain a non-hierarchical, collaborative approach by inviting the entire LA HRTC to participate in a table series that practices data analysis and dialogue. For example, in a 6-session table series, the external researchers or an external partner could facilitate two sessions per report with all LA HRTC members.</p> <ul style="list-style-type: none"> ● Session #1: <ul style="list-style-type: none"> ○ Affinity Hub and Table Leads guide their tables through a data inquiry protocol to interact with, become comfortable talking about and interpreting data using the researcher's reports, key findings and question prompts. ○ See sample data inquiry protocol, from the field of education, that could be adapted for LA HRTC purposes ○ Each table will complete a prepared online form to document their observations and findings as well as provide feedback on the event ● Session #2: <ul style="list-style-type: none"> ○ Affinity and Sub Regional tables discuss and submit what specific information from each report they are interested in bringing to their communities as well as what additional information they want to learn from community members' lived experience related to the report, such as: <ul style="list-style-type: none"> ■ Recovery needs ■ Economic barriers ■ Unmet Challenges ■ Workforce readiness ■ Community Assets and/or opportunities ■ Carbon neutral transition readiness ○ Affinity and Sub Regional tables discuss feasibility of this data and dialogue model being used at broader communities events <ul style="list-style-type: none"> ■ If alternative to data and dialogue model is preferred, participants can recommend potential best-fit outreach and engagement strategies and templates to be added to the Engagement Toolkit and used in next round of data collection ○ Each table will complete a prepared online form to document their observations and recommendations as well as provide feedback on the event

STEP 2: SHARE

(January - February 2024)

**LA HRTC CERF Outreach and Engagement Process Map
Supplemental Narrative**

Focus: Build shared understanding of needs across LA County disinvested communities through learning, data analysis, and dialogue			
Late January	13. Compile and Share Data & Dialogue Table Themes and Key Findings	<u>Owner:</u> LAEDC Research Analyst <u>Review by:</u> Steering Committee	Using the information collected via online forms during the Data & Dialogue table series, the LAEDC Research Analyst can code and summarize key findings into a document that is submitted to the Steering Committee for review before being shared with the entire LA HRTC.
Late January	14. Develop/Refine Data Collection Instruments and Templates within Engagement Toolkit	<u>Owner:</u> Affinity and Table leads <u>Support by:</u> LAEDC Research Analyst and Communications team	Building from the Data & Dialogue table series key findings document, the Affinity and Table Leads can determine/finalize what type of common templates and activities should be used for the next round of data collection within LA County communities and update the Engagement Toolkit accordingly so that the SPA-based Micrograntees have clear guidance and support when interacting with community members.
Late January	15. Host Geographic and Diversity-based Planning Forums	<u>Owner:</u> LAEDC/TBD	Forums should include the dissemination of a prepared paper/online form that requests input in specific areas as well as to provide general feedback on the event. Based on initial info gathering sessions, the owner and timing of these forums is under development. The timing of this task (#15) as well as task #17 is flexible as long as they are completed prior to Step 3 strategy development in March.
Early – Mid February	16. Conduct Additional Sharing and Dialogue Activities within Communities	<u>Owner:</u> SPA-based Micro Grantees <u>Guidance by:</u> Affinity and Table leads	Following guidance from the Affinity and Table Leads and using the Engagement Toolkit resources, the SPA-based Micrograntees can schedule and facilitate at least one information sharing and dialogue activity within their communities. This includes documenting community member input and related information about the event into an online form.
Mid - February	17. Compile and Share Geographic Findings Report	<u>Owner:</u> LAEDC Research Analyst <u>Coordination with:</u> Affinity and Table Leads <u>Review by:</u> Steering Committee	LACERF Research Analyst compiles information submitted at the forums, codes for themes, and generates and shares key findings (focusing on identifying emerging themes for potential strategies) with the Steering Committee before sharing with the entire LA HRTC.
Late February	18. Compile and Share Community Key Findings & Emerging Themes to Inform Strategy Development	<u>Owner:</u> LAEDC Research Analyst <u>Coordination with:</u> Affinity and Table Leads <u>Review by:</u> Steering Committee	LACERF Research Analyst compiles information submitted via the event online form, codes for themes, and generates and shares key findings (focusing on identifying emerging themes for potential strategies) with the Steering Committee before sharing with the entire LA HRTC.

STEP 3: CO-CREATE **(March - April 2024)**

Focus: Create and refine data-informed, inclusive economic development strategies and strategic projects for building an equitable and sustainable regional economy

When	Major Task	Who's Involved	Rationale & Recommendation
Early March	19. Develop Framework for Strategy Development & Evaluation	<u>Owner:</u> Steering Committee	<p>Before work can begin on coming up with specific strategies or strategic projects, it will be important for the Steering Committee to define strategy development and selection processes:</p> <ul style="list-style-type: none"> ● Define parameters for what constitutes a strategy/strategic project ● Identify the evaluation criteria and method that will be used to select final projects <p>Some guiding questions for the Steering Committee to consider include:</p> <ul style="list-style-type: none"> ● What specific components make up a proposed strategy or strategic project? ● How much detail needs to be developed for initial or final consideration? Do we need some or all of the following?: <ul style="list-style-type: none"> ○ Title ○ Start Date/End Date ○ Budget ○ Overall Goals ○ Specific Objectives ○ Target Audience / Populations Served ○ Major Task/Activities ○ Resources ○ Risks ○ Success Criteria ○ Evaluation Plan ● Would it be useful to adapt a simple template for LA HRTC members to work from so ideas are developed in a consistent way with similar levels of detail and can be compared? ● How will the Steering Committee evaluate strategies / proposed projects? <ul style="list-style-type: none"> ○ Creating a rubric with specific criteria and then evaluating potential options against that criteria to generate a score is a familiar and transparent approach that could be adopted here. <p>Note: this task can occur much earlier in the overall timeline at the Steering Committee's discretion; these framing definitions must be in place early March at the latest to support remaining tasks.</p>

STEP 3: CO-CREATE (March - April 2024)

Focus: Create and refine data-informed, inclusive economic development strategies and strategic projects for building an equitable and sustainable regional economy

Mid - March	20. Draft Initial List of Potential Strategies / Strategic Projects	<u>Owner:</u> LAEDC Research Analyst or report writer <u>Review by:</u> Steering Committee	Applying the guidance established by the Steering Committee, the LAEDC Research Analyst or report writer can generate an initial list of potential strategies/strategic projects based on all feedback provided to date. Time permitting, this document could be circulated among Affinity and Table Leads for comment before being sent to the Steering Committee for review.
Late March	21. Update Engagement Toolkit with Strategy Development Templates and Tools	<u>Owner:</u> Affinity and Table Leads <u>Support by:</u> LAEDC Research Analyst <u>Review by:</u> Steering Committee	With the initial list of potential strategies identified, the Affinity Hub Leads, Table Leads, and select LAEDC staff can collaboratively develop a short set of community activities for use by the SPA-based Micro Grantees. Brief, interactive, flexible protocols/templates to support strategy discussion and prioritization are recommended here.
Early April	22. Facilitate Strategy Development Dialogue Table with LA HRTC members	<u>Owner:</u> Affinity and Table Leads	The LA HRTC should again practice data analysis and dialogue during one or more table events to discuss and refine the initial strategy list. It is recommended that Affinity Hub Leads and Table Leads facilitate this session, which includes each table submitting an online form to document their recommendations as well as provide feedback on the event.
Mid - April	23. Conduct Strategy Development and Prioritization Engagement Activities in Communities	<u>Owner:</u> SPA-based Micro Grantees <u>Guidance by:</u> Affinity and Table Leads	Informed by the LA HRTC Strategy Development dialogue event, and using tools from the Engagement Toolkit, SPA-Based Micrograntees can conduct at least one strategy prioritization and feedback activity within their communities. This includes documenting community member input and related information about the event into an online form.
Late April	24. Compile and Share Strategy Development and Prioritization Report	<u>Owner:</u> LAEDC Research Analyst <u>Coordination with:</u> Affinity and Table Leads <u>Review by:</u> Steering Committee	LACERF Research Analyst compiles information submitted at the LA HRTC strategy development table event and the community strategy development and prioritization events, codes for themes, and generates and shares key findings with the Steering Committee before sharing with the entire LA HRTC.

STEP 4: ADOPT

(May - June 2024)

Focus: Select 2-5 strategic projects or investments that are well positioned to support long-term economic resilience and our region’s transition to a carbon neutral economy.

When	Major Task	Who’s Involved	Rationale & Recommendation
Early May	25. Review Strategy Development Report and Select Final Strategies	<u>Owner:</u> Steering Committee	The Steering Committee reviews the strategy development document and applies its previously determined evaluation criteria to select up to 5 final strategies/strategic projects.
May	26. Develop and Release Draft Summary Report	<u>Owner:</u> Steering Committee <u>Support by:</u> Professional Writer	With support from a professional writer, the Steering Committee can now fully develop the draft economic recovery/transition strategies into the final report format.
Early June	27. Host Community Presentations of Draft Report and Request Public Comment	<u>Owner:</u> SPA-based Micro Grantees <u>Guidance by:</u> Affinity and Table Leads	In keeping with a participatory and collaborative outreach and engagement process, it would be beneficial to create opportunities for public review of the draft report. This could be completed through public presentations across LA county at different days/times and/or through a recorded presentation posted online for interested community members who cannot attend in person. Public comments could also be submitted via online form accessible through the website for a set period of days.
Mid-June	28. Revise Report with Summary of Public Comments	<u>Owner:</u> Steering Committee <u>Support by:</u> Professional Writer	Research partners/professional writers compile feedback from public comment for Steering Committee review and discussion. Steering committee reviews and incorporates feedback and finalizes the report for submission to the State of California. A record of how public comment and feedback was handled should be posted to the website; this serves as a transparent feedback loop for community members to see how their comments were considered and reflected in the report, if applicable.
End of June	29. Submit Report and Regional Plan Part 2	<u>Owner:</u> Steering Committee	Required CERF Milestone based on important dates timeline on lacerf.org (last accessed 9/22/2023)