

# Together San Rafael

## Co-Creation Workshop Summary Draft

**Date/Time:** Tuesday, March 28, 2017, 9-12pm

**Location:** Apex Suites, San Rafael, CA

**Attendees:** [Together San Rafael Advisory Committee] - Alan Piombo; Alex Holm; Andrea Gilles; Anthony Heaven; Blake Delzell; Cameron Mrsny; Crystal Marker; Danielle Ferrigno; David Casalnuovo; DJ Heckler; Dylan Frisbie; Jason Hatfield; Joan Peck; Josh Minshall; Laraine Gittens; Lauren Crandell; Lidia Que; Lindsay Lara; Pat Nolan; Raffi Bolyan; Steve Mason; Sylvia Gonzalez; Talia Smith; Todd Berringer; William Calhoun

[Together San Rafael Committee Members not in attendance] - Anthony Alviso; Ashley Howe; Garrett Northern; Kyle Reuter; Mireya Renteria; Paul Bowermaster; Trina Vadon; Vinh Pham

**Facilitators:** [CivicMakers] Judi Brown, Lawrence Grodeska, Cristelle Blackford

### **Overview:**

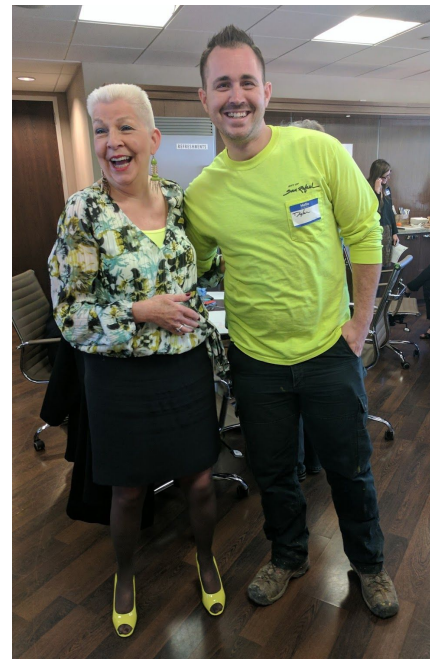
Together San Rafael combines two elements: the City Service Innovation Project (an effort to modernize city services) and initiatives to make San Rafael a great place to work.

The purpose of the City Service Innovation (CSI) program is to encourage and support a culture of collaborative problem solving, where:

- All City of San Rafael employees, regardless of position or tenure, are empowered to share and implement their innovative ideas
- Employees are inspired by their mission to continuously improve the quality of life in San Rafael

On March 23, 2017 the Together San Rafael team gathered a group of City staff representing all departments and all levels in the organization (the Together San Rafael Advisory Committee) for the first “co-creation” workshop. The goals of the workshop were to:

- Provide an opportunity Advisory Committee members and project team staff to get to know each other and get comfortable working together
- Meet the CivicMakers team and understand their role in the project



- Provide the Advisory Committee with an explanation of their roles and responsibilities
- Gather input from the Advisory Committee on the design of the pilot CSI staff training that is currently being developed by CivicMakers and the City Project Management team

Based on this input, CivicMakers will develop a draft curriculum that will be sent to the Advisory Committee, City Leadership and City Project Management Team for input.

### **Summary of Key Themes**

- What skills do you think City staff need in order to do the work of innovating City services?
  - Process Improvement Techniques
  - Digital and Technology Skills
  - Customer Service & Community Engagement
  - Organization & Time Management
  - Problem Solving Methods
- How should we learn these skills?
  - Methods: in-person training, video/webinar, train-the-trainer/mentor
  - Materials: toolkits, online collaborative resources, visualizations, case studies
  - Activities: hands-on, small groups, fieldwork, collaboration/brainstorming
- What should we call the trainings
  - Together/Collaborative
  - Forward-thinking/Transformative
  - Experts/Change-makers
- How should we share information/success stories internally and externally, and how to help the Community understand what City staff do?
  - Digital: email, videos, collaborative online platform/wiki/intranet
  - Physical: flyers in bathroom stalls, buttons
  - Ambassadors: people attend other department meetings to share info

## **PART I: CONTEXT SETTING**

### **A. Presentation**

Rebecca Woodbury from the City Project Management team gave a presentation that introduced the City Services Innovation project. Lawrence Grodeska introduced the CivicMakers team and explained their role in the



project. The full presentation can be found in *Appendix I*.

## B. Reflections on Pahlka's Talk

The group was asked to watch a talk by Jennifer Pahlka of Code for America called "[Fixing Government: Bottom Up and Outside In](#)" and to bring a post-it note indicating what about the talk was most inspiring.

### Key Themes

- Embrace relevant technology
- Focus on needs of users
- Bottom-up, efficient, and cost-effective solutions

### [Verbal share-out]

- If we stay behind with regards to tech, it will only get worse and worse - makes our jobs with public harder.
- VA Online form ordeal - needed everything aligned, there was a need to have something more flexible; had to prove need for an easy fix
- Inside Out, Outside In thinking + follow-up with a human being. Seeing if the strategy you are thinking about is actually working/going to work.
- The state didn't have to spend all that money to get the same outcome; you don't have to do it the same old way.
- Being careful not to over-ask for information. Get what we want but not overask.
- "Elites" didn't understand technology
- "In our department, tech is something folks shy away from - we have been doing something for 30 years, why change it?"
- Unintended consequences when over regulating and under regulating.
- \$300 hammer example (multiplies into higher costs).
  - "I just need the hammer. Tech, policy, whatever - the end result is that I need the tools to get the job done. Make sure we have the right tools no matter what."
- Design for users, not for us
- Efficiency as a form of social justice
- Some processes are broken; don't need new tools



- “I think our scope is much larger than just thinking about tools. We need to look internally and talk about how we functioned.” Ex: Business Licensing

### [Written Post-its]

- Simple is better. <3
- People occasionally unintentionally sabotage instead of simply voicing a concern
- Focus on positive solutions as much as possible, not on what doesn't work
- We sabotage ourselves
- Bottom-up: designing city services for residents, by staff
- Meet user needs, not government needs - makes me look at what is truly my job? To help citizens of SR!
- Poor people and people of color benefit from ease of use and efficiency
- Stop collecting BID fees let BID handles themselves (no benefit for us to do)
- By creating/improving our application & websites to be more user friendly/simple we can give more effective support to individuals without adding any additional cost; ex: child care enrollments now vs. next fall when we move to online/computer enrollment

## **PART II: CO-CREATION**

### **A. Reflecting on Professional Development**

Committee members were asked to reflect on their professional development experiences and to share their associations and examples of good skill development opportunities.

### **Key Themes**

- *Professional development means:* Learning, Advancing... but is sometimes Boring or Unrewarding
- Great professional development experiences provide:
  - Opportunities to learn from others with experiences
  - Learning new approaches
  - Ability to pick what you want to learn
  - Ongoing sharing of ideas or mentorship

### [Verbal share-out]

- What is your understanding of “professional development?”
  - Promotion/Advancement
  - Training
  - Mentoring
  - Boring
  - Challenging
  - Bosses delegating the stuff they don't want to do themselves





- Systems Analysis
- Process Mapping
- Developing Flow Charts/Visuals
- Digital Skills
  - Basic Computer skills (Microsoft Office)
  - Tools for Communications
  - Multimedia (video)
  - Social Media
- Customer Service + Community Engagement
  - User-centered Design
  - Public-Private Partnerships
  - User Testing
  - Gathering and using customer feedback
- Communication + Collaboration
  - Active Listening
  - Cross-departmental Collaboration
  - Communication within Departments
  - Group Facilitation
- Organization + Time Management
  - Prioritization
  - Task/Project Management Tools
  - Delegation
- Problem-solving Methods
  - Co-creation
  - Change Management
  - What kinds of policies and ordinances *can* be changed?

### **Outliers**

Post-its reflected a few outliers related to budget development, allocation and internal processes related to finance. A general consensus observed among the group was that professional development is great, but without the time and money to implement, it may not be useful.

### **C. How We Want to Learn**

Each key table was labeled with one of the themes summarized above and a notetaker was designated for each table. Advisory Committee members circulated between the tables and shared ideas for how each skill could be learned. Notetakers at each table recorded ideas.

### **Key Themes**

- Methods: in-person training, video/webinar, train-the-trainer/mentor
- Materials: toolkits, online collaborative resources, visualizations, case studies
- Activities: hands-on, small groups, fieldwork, collaboration/brainstorming

<b>SKILL</b>	<b>METHODS</b>	<b>MATERIALS</b>	<b>ACTIVITIES</b>
<b>Process Improvement Techniques</b>	<ul style="list-style-type: none"> <li>• Comprehensive process review</li> <li>• Look at other agencies for ideas/solutions</li> <li>• Use data and experiment</li> <li>• Classroom + webinar</li> <li>• Train the trainer</li> </ul>	<ul style="list-style-type: none"> <li>• Rules &amp; Regulations</li> <li>• Process maps</li> <li>• Guides or a video guide as follow-up</li> </ul>	<ul style="list-style-type: none"> <li>• Workflow mapping</li> <li>• Modeling &amp; shadowing</li> <li>• Learn by doing</li> <li>• Visit each department (fieldwork)</li> <li>• Practice facilitation</li> </ul>
<b>Digital Skills</b>	<ul style="list-style-type: none"> <li>• Interactive webinar</li> <li>• Work with subject expert</li> <li>• Tiered education approach (beginners, etc.)</li> <li>• Refresher training and follow-ups</li> </ul>	<ul style="list-style-type: none"> <li>• Manuals + guidebooks</li> <li>• Web-based tutorials</li> <li>• Guidelines and standards for communicating to public</li> <li>• Look at outside examples (other cities/departments)</li> </ul>	<ul style="list-style-type: none"> <li>• Practice using in small groups</li> <li>• In-house experts work with beginners</li> <li>• Combination of hands-on practice and self-directed learning</li> <li>• Share across departments</li> </ul>
<b>Customer Service + Community Engagement</b>	<ul style="list-style-type: none"> <li>• Role play</li> <li>• Subject matter expert</li> <li>• Town Hall video</li> <li>• Field work</li> <li>• Mentor/mentee</li> <li>• Situational testing</li> <li>• Digital suggestion box</li> </ul>	<ul style="list-style-type: none"> <li>• Video learning</li> <li>• Live meetings</li> <li>• Feedback loop / Tracking repeat issues</li> <li>• Learn community issues/people</li> <li>• Learn thresholds for flexibility</li> <li>• Surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Small group work</li> <li>• Survey for feedback</li> <li>• Buddy system</li> <li>• Take meetings to the people</li> <li>• Customer service experts</li> </ul>
<b>Communication + Collaboration</b>	<ul style="list-style-type: none"> <li>• Face-to-face training</li> <li>• Webinars</li> <li>• Reading &amp; Research</li> <li>• Train-the-trainer</li> </ul>	<ul style="list-style-type: none"> <li>• Visual representations</li> <li>• Tech solutions (virtual collaboration)</li> </ul>	<ul style="list-style-type: none"> <li>• Role play (practice by doing)</li> <li>• Video feedback</li> <li>• Practical exercises - Organizing into groups w/ real</li> </ul>

	<ul style="list-style-type: none"> <li>(work unit liaison)</li> <li>• Inter-Dept. Coffee Meet &amp; Greet</li> <li>• Open Houses by Dept</li> <li>• Structured Courses (e.g., Public Speaking) / “ToastMasters”</li> <li>• Cross-Dept Retreats</li> </ul>		<ul style="list-style-type: none"> <li>issues</li> <li>• Listening</li> <li>• Project review by peer expert</li> <li>• Self-awareness</li> <li>• Small Group Exercises</li> <li>• Situational Learning by Doing</li> </ul>
<b>Organization + Time Management</b>	<ul style="list-style-type: none"> <li>• Webinars (self-paced)</li> <li>• Classroom (interactive)</li> <li>• Eliminate redundancy</li> <li>• Prioritize goals - okay to say no</li> </ul>	<ul style="list-style-type: none"> <li>• Manual/field training guide (online living document)</li> </ul>	<ul style="list-style-type: none"> <li>• Brainstorming</li> <li>• Practical applications (pilot programs)</li> <li>• Standard setting (and coordination across teams)</li> </ul>
<b>Problem-Solving Methods</b>	<ul style="list-style-type: none"> <li>• User circle process</li> <li>• Set clear expectations and goals</li> <li>• Test solutions in real world (pilot)</li> <li>• Establish accountability</li> <li>• Practice iteration</li> <li>• Incorporate decision-makers (include all levels)</li> <li>• Establish feedback loops</li> </ul>	<ul style="list-style-type: none"> <li>• Case studies</li> <li>• White boards in creative space</li> <li>• Listserv or forum to learn from others</li> <li>• Data dashboard</li> </ul>	<ul style="list-style-type: none"> <li>• Small groups</li> <li>• Collaboration &amp; brainstorm</li> <li>• Research &amp; discuss</li> <li>• Game show/quiz</li> <li>• Get out of usual environment (ex: spend day at Community Center)</li> <li>• Webinar</li> <li>• Job shadowing</li> </ul>

## **Part III: Conclusion**

### **A. What Should We Call This?**

The facilitators asked Committee members to verbally share ideas for what the training should be called.

#### **Key Themes**

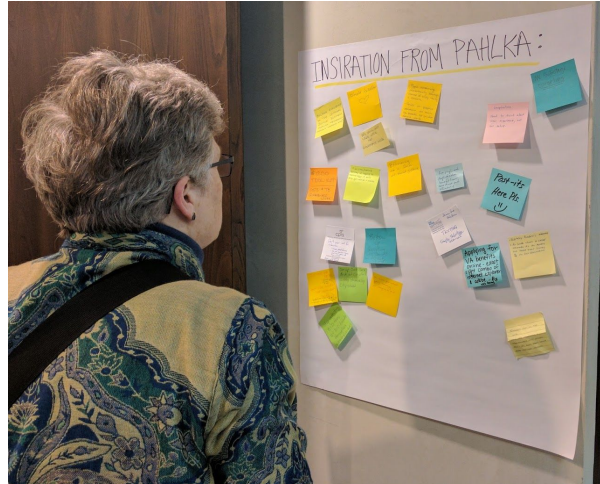
- Together/Collaborative
- Forward-thinking/Transformative



- Experts/Change-makers

#### [Verbal share-out]

- Collaboration
- Round Table
- Together San Rafael
- Together
- Forward
- Revolution
- Next Gen
- Evolution
- Adapting
- Mastery
- Improve
- Catalyst
- University
- Not “Academy” = Command and control, come and learn from us; not inviting.
- “Free Food and Things”



#### **B. Best way to share information/success stories?**

The facilitators asked Committee members to verbally share the best ways to share information about this initiative with the rest of the organization.

#### Key Themes

- Digital: email, videos, collaborative online platform/wiki/intranet
- Physical: flyers in bathroom stalls, buttons
- Ambassadors: people attend other department meetings to share info

#### [Verbal share-out]

- Pair people up and they go to each other’s departments and attend meetings, etc and give updates, see faces - Ambassador approach, buddy system
- Something tangible to pass around/give: buttons, mugs
- Transparent, citywide email
- Online forum to keep discussion going
  - Facebook page was vetoed by group
  - Not everyone will want their name to their idea, provide anonymity
  - Working Group to figure out platform
  - Transparency important whatever the platform
- Two-way communication: allow anyone to contact Advisory Committee
- Encourage all city employees to reach out to people in the room
- Videos
- Bathroom Stalls

### **C. What did you like and what would you improve about this workshop?**

Finally, the meeting concluded with the project team collecting input from participants on what worked well and how they would improve this workshop.

#### **[Verbal share-out]**

##### **PLUS (what worked well?)**

- Encouraging people to sit with folks they don't know
- Food and coffee

##### **DELTA (what needs to change?)**

- Room was too small; recommend utilizing different spaces and touring different departments
- 3 hours went really quickly - can we have more time?
  - Push back re: 3 hours for public safety folks
  - "Didn't feel like we got into it as much as we could"
- How do we capture all of these great ideas?
- Way more awake in afternoon - different times? (2 people preferred afternoons)
- Clarity around expectations, goals for day
- Clarity around prioritization for next steps
- "Consider coming into these discussions not as work: think, exchange ideas, not getting stuck in a process" - William
- Use data gathered today as a baseline for ideas

#### **Appendix I: Presentation Deck**

#### **Appendix II: Post-It Note Transcription**

#### **Appendix III: Survey Results**