

# CHAPTER 09

# LESSONS LEARNED

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**Centering equity in a planning and implementation project requires an openness to new ideas, processes, and iterative co-creation to reach the outcomes sought by community and public stakeholders.**

Capacity building, working within constraints while pushing boundaries, and understanding the trade-offs and compromises needed to implement actionable plans are prerequisites to any measure of success. Through the course of this project, from scoping through finalization, we learned many lessons, and created recommendations from them. Below are some of the key takeaways from this process, noted as considerations and recommendations for future equity-centered work.

## SCOPING & SETTING EXPECTATIONS

Despite thoughtful scoping and funding of the project, expectations from community members and city partners around the outcomes were not initially aligned. ETF members felt constrained by the City's focus on emerging mobility. The issues their communities were struggling with were so much larger than transportation, and emerging mobility was seen as largely irrelevant. For the many communities experiencing housing and job insecurity, electric vehicles, autonomous shuttles, or micromobility are far down their list of concerns compared to more immediate needs like housing, displacement, and access to social services and stable jobs. Additionally, current configurations didn't meet the needs of many residents, were difficult to access, and deployments in their neighborhoods were seen as yet another example of the City pursuing its own aims rather than developing solutions with its communities. It took a lot of listening and discussion for the project team and City to fully appreciate the larger issues communities were wrestling with and for ETF members to see

where there might be some utility to emerging mobility if it could be configured to meet their communities' needs.

Throughout the course of these initial discussions, and through the life of the project, ETF members expressed the importance of greater housing affordability in locations near services and transportation resources. As communities are pushed out of San José, farther from good paying jobs and other resources, and farther from high quality transit, the ability to rely on public services to reach all their daily needs, from schools to jobs to healthcare to recreation, becomes more difficult.

In addition to greater housing choices, ETF members highlighted the importance of transit systems that actually meet their needs, with frequent service to and from locations where they currently live and work or would like to. In the absence of these systems, communities rely on private vehicles for mobility, and expressed concerns over City policies that may impact their already burdened transportation costs. For example, reducing



parking in downtown areas benefits the City and its residents through reduced vehicle use and greenhouse gas (GHG) emissions. But, for low-income folks who rely on a car to get to work, it may increase the cost of driving without providing viable alternatives. To address these tensions and nuanced tradeoff considerations, this plan has integrated considerations beyond emerging mobility that have come up throughout the project. These include considerations and issues around housing, personal and community safety, transit, land use, and economic opportunities. Each of these concerns will require nuanced and collaborative policy and planning from the City and its communities.

In using the GARE framework for this project, we also recognized that iteration is an important component of equitable planning. The linear structure and requirements of the grant proved challenging, as we continued to learn and iterate with the community through the process. The equity framework we utilized, based on GARE but with more cyclical structures, allowed for the Equity Task Force and community to provide greater and more detailed input in shaping the recommendations. Frameworks will generally include similar steps, but may need to be refined for various project and program types, to allow iteration with community through the various steps of policy or project-making.

Another limitation in this project was the fact that the grant was written without community involvement. To secure the funds, the City configured its project to comply with the funder's program goals, timeline, and funding restrictions. By the time community members were involved, the goals, scope, and schedule of the project were set; there was very little that could be changed, which understandably generated friction. The project team and City sought to provide as much room to maneuver within those constraints as possible, but it was too late in the process to make substantive changes.

As grant funding will likely continue to be a major source of support for City plans and projects at a minimum, the City should make these expectations and constraints clear at the onset, and at the conclusion of every project invite community input on how to improve the next project. Ideally, the City should identify ways it can work with community leaders and organizations to get input during project conceptualization or perhaps partner with them in jointly drafting and submitting proposals. As many grant funding cycles happen annually, the time between funding release and application is often limited, making longer community processes difficult to incorporate at the front end. Thus, projects already identified, in plans such as this one, are often the first to be considered. As the City works to improve future planning studies and include greater community collaboration, it can prepare for more immediate funding cycles through continued capacity building with community groups, to ensure the existing processes are well understood and prepared for by community leaders before funding is available. This will allow the City to emphasize

the community's perspective in their discussions with grant administrators and in their applications. Additionally, the City can work with an advisory group, a bench of CBOs, or alternate group of community leaders to receive input and proposed changes to existing plans and to ensure a greater collaborative effort in projects proposed for funding, even if they are not co-created with the community.

The City should also provide feedback to grant administrators to encourage them to consider inclusion of a requirement for city agencies to partner directly with CBOs on grant applications and to provide funding for this. Community members should be involved in scoping, project design, and logistics. Grantees should also document points of friction with grant requirements, to inform future programs. Restrictions around forms of compensation and eligible expenses (e.g., gift cards to encourage participation or compensate focus group participants), for example created challenges for quality and creative engagement. In addition, the City can advocate for the inclusion of community members at the decision-making table in discussions with grant administrators—community members who have applied for grants shared that funding organizations are often open to hearing directly from impacted communities.

## EQUITY TASK FORCE ENGAGEMENT

This project presented the City with an opportunity to engage with a dedicated group of community leaders and organizational partners for an extended period. Our partners on the Equity Task Force (ETF) were experts on their communities and in many categories, but fairly unfamiliar with transportation planning and working in co-creation with the Department of Transportation. The goal was for the ETF to co-lead this planning process, but the City and project team quickly realized that we were expecting the ETF members to suggest program and policy solutions without providing them with the baseline understanding and information they needed to make that leap. A third party that understands both city processes and community needs and interests, which for this Plan was helped by private consultants, may help enhance collaboration, acting as a bridge between the expertise of the community partners and the requirements of city officials, and helping to build a shared understanding and trust. This role can be taken on by community engagement specialists within the city, a consultant, advisor, or trusted community member who works in the field of the project.



Source: Nelson\Nygaard

### PRIORITIZE RELATIONSHIP BUILDING FROM THE OUTSET AND INTEGRATE THROUGHOUT THE PROCESS.

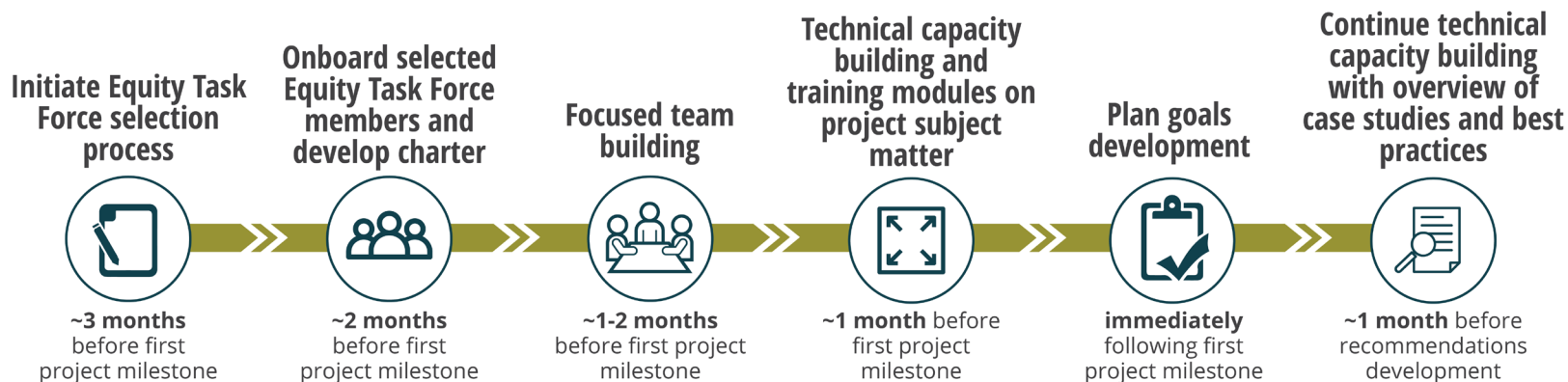
When bringing together community members with different backgrounds and areas of interest, dedicate time and space for members to connect and get to know each other. Having discussions around lived experiences and past harms can be challenging and uncomfortable, so it's imperative to co-create a space with community members where they can feel vulnerable and know they have the support and trust of their peers.

Dynamics between members also reflect how they speak to each other, how constructive their conversations are, how they take action and make decisions together, and how effectively they can build consensus when differing opinions on a topic arise.

We recommend making team building the primary focus during the onboarding process. Where appropriate, the project team should also participate in these team building activities to create a greater sense of trust and respect. This should be

done well before the first project milestone. There was little time between onboarding ETF members and the existing conditions deliverable. This shift in the project, while driven by the project timeline, felt abrupt. ETF members wanted more time to connect with their peers, get to know the project team, and orient themselves to this work. In hindsight, the project team would have liked to onboard ETF members earlier in the project cycle to allow more time for team building, charter development, and racial equity and emerging mobility training.

Finding opportunities to integrate team building activities both within and outside of standing meetings is also key to sustaining engagement and creating a sense of cohesion within the group. ETF members created a practice within meetings to share updates on what their respective organizations are working on and to do an ice breaker before diving into project-specific content. Several members suggested hosting in-person meetings that involve rotating between their CBO offices or workspaces. However, some members were uncomfortable meeting in person due to the ongoing COVID-19 public health crisis.



### **DEDICATE TIME FOR CAPACITY BUILDING.**

It's imperative to build this technical capacity early in the engagement process to help community members feel comfortable and confident in talking about how to improve transportation generally and make use of emerging mobility. ETF members expressed that the transition from onboarding to project tasks was too abrupt, and more time was needed at the start of engagement to unpack the project scope and timeline and approaches for integrating communitywide engagement. Even in projects that hope to shift existing paradigms, current processes and factors related to program management must be understood and dissected. The ETF recognized this quickly and noted that they would have benefited from greater analysis and technical understanding of the project at the outset, including its relationship to other, connected projects and programs in the city. A more deliberate timeline dedicated to building trust, relationships, and capacity before diving into any specific project work would have benefited the process.

We found some success providing reading assignments and facilitated discussions during meetings but would recommend dedicating time to hosting a series of training sessions that allow for deeper discussions around emerging mobility and the City's role in regulating these services well before reaching the first milestone of a project.

One tool the project team developed to assist the ETF was to create a primer that included a glossary of common terms used

when talking about emerging mobility, as well as examples of different types of emerging mobility options and services. We also dedicated a meeting to discuss the primer and answer any questions ETF members had about emerging mobility. This helped to establish baseline knowledge and shared definitions to help ETF members feel empowered when providing feedback on recommendations. Additionally, providing case studies and best practices of pilot projects, programs, and policies from peer cities can help community members envision how various emerging mobility services might (or might not) work for their communities. An overview of case studies should be provided throughout the technical capacity-building process, but especially before developing recommendations so that community members can build from real-world examples that pique their interest.

City staff, the City's community engagement consultant, and the ETF were able to secure a capacity-building grant for the ETF through the American Cities Climate Challenge. The grant enabled the ETF members to spend time learning about topics they were interested in, such as the purpose and function of the county and regional transportation agencies and efforts that local organizations (including some of their members) were making to reduce homelessness, increase affordable housing, and improve public safety in San José's. ETF members said they found the additional information useful, but the additional time required for this was exhausting.



Source: Nelson\Nygaard

### **CLARIFY EXPECTATIONS AND ESTABLISH PROJECT TEAM ACCOUNTABILITY MEASURES.**

Shortly after forming the ETF, the project team worked with members to establish a community agreement that reflected shared values and expectations for interactions between members as well as a memorandum of understanding (MOU) outlining the number of ETF meetings and communitywide engagement activities members could lead or support.

While these were useful starting points for ETF engagement, a detailed, community-developed charter with support from the project team would have been more effective in setting expectations and creating accountability measures for city staff and the project team. The ETF updated their community agreement in response to growing frustrations, however, establishing a charter or written document outlining expectations at the outset of engagement well before the first project milestone would have prevented such difficulties. Sufficient time and budget should be dedicated to this process to allow members to workshop and build consensus around internal procedures and models for self-governance.



## TAILOR FACILITATION AND CONTENT TO DIFFERENT LEARNING STYLES.

Content should be clear, concise, and digestible when discussing technical and unfamiliar topics. We were reminded time and again by the ETF members about the importance of avoiding jargon, breaking down key concepts, and using multiple mediums to convey information. From this process, we learned many ETF members wanted more time to thoroughly review project content in advance of meetings, especially for more technical and dense materials. We found some success providing take-home assignments and reading materials in preparation for upcoming meetings. This not only gave community members more time to review and generate questions around the content, but it also allowed us to discuss those questions in the meeting rather than simply present the content. Breaking up content into smaller chunks also made the material more accessible and less overwhelming for ETF members who are often coming to meetings after a full day of work.

Facilitation of content material should also be tailored to different learning styles. During the COVID-19 pandemic, where much of engagement transitioned from in-person to the virtual, the use of virtual settings to collaborate required even greater attention to the ways people absorb and share information. Many ETF members expressed feeling more comfortable engaging with dense content when in small group settings, and preferred short, simple materials during meeting

presentations. This felt even more true in a virtual setting, as physical interaction and movement is limited, and reviewing materials on a screen felt more onerous. Providing concrete examples, including using a variety of visual examples like photos, diagrams, charts, and maps, is also helpful in creating understanding around new concepts. Additionally, finding a balance between presenting new materials and designing interactive activities to create understanding helped to increase engagement.

### Carshare

Carshare offers on-demand access to a fleet of vehicles that are maintained by a carshare organization. Vehicles are often located within neighborhoods, near transit stations, employment and shopping centers, or universities. The carshare organization can provide insurance, gasoline, parking, and vehicle maintenance. Customers who use this service may pay a fee each time they use the service or may pay a membership for regular access to the service.



### Courier Network Services

Courier Network Services are on-demand delivery services where drivers deliver goods to customers who place their order via an online app or platform. Drivers typically use their own personal vehicles, bicycles, or scooters to make deliveries within a short time period. Goods that may be delivered include prepared meals, groceries, and essential household items. Customers pay for the goods and the delivery service.



From left to right: Autonomous sidewalk delivery robots, DoorDash bike courier, UberEats delivery

### **FORMALIZE A FEEDBACK LOOP BETWEEN THE TASK FORCE, CITY, AND PROJECT TEAM.**

Co-creating accountability measures and integrating them into a feedback loop between task force members, City staff, and the project team is critical for trust-building. ETF members wanted to know where and how their feedback was being integrated into stakeholder conversations and project deliverables. In cases where their feedback was not incorporated, they wanted to understand why and how those decisions were made. Listing out clear actions, from providing clear documentation of all collected feedback to highlighting sections where feedback was incorporated into final deliverables, ensures community voices are elevated in the work. Other strategies included inviting a senior departmental staff member to meet with the ETF and inviting ETF members to facilitate discussions with technical and public advisory groups who were in a position to review and directly respond to community feedback. This not only helped to create a sense of ownership over the work, but also allowed ETF members to share their concerns and desires directly with City leaders and practitioners and to ask questions about their work. It's imperative to provide clear documentation of community feedback—this can be in the form of summarized notes that are distributed to ETF members, the project team, and citywide for people who are interested in and following progress updates on the project.

### **ENCOURAGE REGULAR SELF-ASSESSMENT.**

Regular self-assessment opens communication, improves group dynamics, and creates a sense of trust between community members and the project team. Dedicating times for self-assessments and integrating them into the project timeline ensures adequate time and budget for a thorough assessment. There should also be some flexibility to allow for ad-hoc assessments in the case that community members express frustrations around process that need to be addressed before moving on to project needs. Tamika Butler, the equity thought partner and strategist for the project team, led the midpoint assessment for ETF engagement by conducting one-on-one interviews with ETF members and the project team. This culminated in a presentation and honest discussion around project objectives, concerns around meeting facilitation styles, compensation structure, and communication blocks within the group. This assessment provided the project team with valuable feedback on how to improve the process and established precedence to allow for difficult, but necessary conversations moving forward. The project team conducted a second, final round of assessment at the conclusion of the project.

## COMMUNITYWIDE ENGAGEMENT

### LEAN ON COMMUNITY LEADERS TO VET CONTENT AND ENSURE IT IS DIGESTIBLE AND CULTURALLY SENSITIVE.

Because they have developed strong relationships with individuals in their communities, community leaders are in the best position to gauge how content will be received. For example, we learned from one ETF member that depending on how terms like ‘city’ or ‘government’ are translated from English to Vietnamese, community members may interpret content negatively due to historical circumstances that involved mistrust of government entities. Working with organizations and translators who are aware of the sensitivities and language access needs of their communities is critical when translating technical information from English to core languages like Spanish, Chinese, and Tagalog. We also learned that while maps are a useful tool for practitioners who are trained to use them for analyses, they are not always intuitive to the average community member. If maps are used, work with community members to identify points of interest that are recognizable by the broader community—this can include major landmarks, cultural plazas, or historical buildings—to help individuals orient themselves.



Source: NelsonNygaard

### **USE A VARIETY OF ENGAGEMENT METHODS FOR DIFFERENT FORMS OF FEEDBACK.**

People engage in the community in different ways and diversity within communities may require use of different engagement methods to raise awareness and understanding. Engagement methods should vary based on the type of feedback needed to inform the project. Smaller, more intimate engagement methods like community-led focus groups were better suited when discussing existing conditions, developing recommendations, and engaging with targeted populations for the first time. Larger in-person events such as a community resource fair, Veggielution First Saturday, or the Capitol Flea Market, are effective for disseminating information about the project and prioritizing recommendations. Many community members expressed interest in existing emerging mobility services and discount programs that they previously were not aware of after attending the community resource fair organized by the ETF. Scooter and bike sharing companies provided opportunities for attendees to test out the devices, ask questions, and enroll in discount programs.

### **EXTEND OUTREACH AND ENGAGEMENT BEYOND ETF NETWORK.**

The ETF played a pivotal role in connecting the City and project team to communities the City had not previously engaged with. While their reach is extensive, it has been noted by other community leaders that the ETF skews young and is not entirely representative of the city's residents. Most notably, it lacked representation from senior, disability, unhoused, and Indigenous groups, communities that through no fault of their own must continue to fight for space at the decision-making table. Likewise, individuals who may not be affiliated with a community-based organization or who may not be connected to social services might not have been reached as part of this planning process. While the project team was able to engage with people from the senior, disability, and Indigenous communities through targeted small group discussions and one-on-one interviews, more can be done to foster long-term relationships that allow for ongoing engagement.

In addition to building relationships with a broader network of community-based organizations, the City should consider partnering with human and social service agencies, schools, universities, community centers, staff at affordable housing sites, and organizations that focus on language access barriers to broaden its reach across its communities.