Memorandum: Final Report resulting from inter-agency collaboration between Corrections Health and the Multnomah County Sheriff's Office

To:
Jenny Smith, Chief of Staff for Multnomah County Chair Jessica Vega Pederson
Abbey Stamp, Executive Director for Multnomah County Local Public Safety Coordinating Council (LPSCC)

From:
Jenny Carver, Deputy Chief of Staff for Multnomah County Sheriff's Office
Tony Gaines, Deputy Director for Corrections Health, Multnomah County Health Department

Re: R.6 Budget Modification NonD-011 - Appropriate $200,000 from General Fund Contingency for inter-agency collaboration between Corrections Health and the Multnomah County Sheriff's Office

Final Report resulting from inter-agency collaboration between Corrections Health and the Multnomah County Sheriff's Office

Date: July 15, 2024

Since early May, representatives from the Sheriff's Office and Corrections Health have been working with consultants from **Territory Inc** to strengthen our relationships and develop agreements around our shared work in the County jails.

We have completed the first phase of our interagency collaboration with Territory. This Memo provides the final deliverables that resulted from the work thus far and an update for our ongoing efforts.

A team of consultants from Territory facilitated multiple sessions to explore **eleven interagency goals** based on recommendations from the National Institute of Corrections and other evaluations. The project team reflected individually and as a group on the potential impacts and effort associated with implementing each of the goals. From there, we began the work of developing strategies that are grounded in the collective knowledge and experience of our operational staff about the current state and potential barriers.

Representatives who participated in these sessions will continue to meet regularly and work together. To guide our efforts, we'll draw on the **Strategic Framework** that

Territory partnered with us to develop and an **Individual Goal Plan template** to capture the elements of how we will implement each goal. These presentations are also included with this Memo as Powerpoint Presentations.

- **[Strategic Framework Slide Deck](#):** This slide deck provides an overview of the project and tools and resources to guide and support ongoing efforts.
- **[Individual Goal Plan Template](#):** This slide deck includes the Goal Plan templates themselves as well as a short description for what each section will include.

Territory consultants also facilitated a couple shorter sessions with organizational leaders from the Sheriff's Office and Corrections Health to work on our shared purpose, project goals and responsibilities and the best way to document them for clarity, transparency and accountability. Together, we landed on moving forward with a **Memorandum of Understanding.** We have begun drafting an MOU and look forward to completing it in the next couple of months.

We thank you again for your support for this important work and look forward to providing a more in depth update during a Board Briefing on August 27, 2024.

Multnomah County
Interagency Recommendations Project

Strategic Framework for Collaborative Action

JUNE 28, 2024

territory

Introduction

If you're reading this, you've likely been involved with (or have recently asked to join) the Interagency Recommendations Project focused on improving certain aspects of the experience for adults in custody (AIC) and staff in Multnomah County jails and facilities.

This framework provides you and your collaborators the context and structure to continue your important work. We've included an overview of the project, and tools and resources to guide and support ongoing efforts to achieve critical goals.

The materials within are to help inspire your teams to convene, collaborate, and create action plans. You'll learn some best practices to engage partners, approach strategies for accelerating your impact, and cultivate an environment of human-centered practices that carry beyond the scope of this project.

Using this framework

STRUCTURE

This framework is broken into two main sections:

1. The Overview section provides essential background on the Multnomah County Interagency Recommendations Project. Here you'll find information about this project's context and participants, shared guiding values, and other foundational pieces to this collaborative work.
2. Tools for Teams provides instructions and resources to help guide your work. Here you'll find suggested best practices, sample handouts and templates, articles, and more to provide extra support along your project journey. You can easily adapt most of these resources to the collaborative work in front of you, and to future work as well.

DOWNLOADING AND USING TOOLS/RESOURCES

Tools and resources throughout this guidebook are housed as view-only files on a Google Drive.

You do not need a Google account to access and use these files. Use the files in one of two ways:

1. Once you open a link, select File > Download from the menu and save the file in whatever format you prefer.
2. If you have a Google account, you can select File > Make a Copy to save the file to your Google Drive.

Contents

Overview

Project background

In May and June 2024, staff from the Multnomah County Sheriff's Office (MCSO) and Corrections Health (CH) engaged in work sessions to strengthen our relationships and develop agreements around our shared work in County Jails by:

- Developing a shared strategy for responding to recommendations and observations as part of the Corrections Recommendations Project
- Identifying the best tool to memorialize our shared purpose, project goals and responsibilities

To help ensure best practices for interagency collaboration, MCSO and CH partnered with Territory agency in these key areas:

- Infuse human-centered design principles into the process
- Prioritize goals and strategies for the work
- Engage the operational leadership team in using an equity and values-based lens to identify changes that will impact adults in custody (AIC) and staff delivering services in Multnomah County jails.

Approach

After co-creating activities and agendas rooted in interagency goals and priorities, Territory facilitators co-hosted stakeholder work sessions to gather information, co-design processes, and move toward alignment and collaboration.

This series of highly-focused meetings resulted in renewed commitments and direction so meaningful collaboration between agencies can continue to move this important work forward.

MEETINGS OVERVIEW

Session #1: Approaching the work: Intro to project, participant involvement

Session #2: Exploring goals: Areas of collaboration, equity alignment

Session #3: Defining accountability: Effort, impact, continuing collaboration

Session #4: Reviewing the work: Project status, guiding vision and values

Session #5: Moving work forward: Designating leadership, strategies, tactics

What we accomplished

The Interagency Recommendations Project is a vital piece of the larger [2024 Corrections Recommendations Project](#). This project focuses on observations and recommendations from the following reports:

- Oregon State Police review of MCSO in-custody death investigations 2023, (2024)
- National Institute of Corrections (NIC) Technical Assistance Report, (2024)
- Oregon Jail Standards Inspection, (2024)
- Individual Reports following Additional Inspection of County Jails 2023, (2023)
- Corrections Grand Jury Annual Report, (2023)
- Multnomah County Auditor's Office Multnomah County Jail Conditions Audit, (2022)

In total, more than 292 individual detailed recommendations were organized by Theme, Category and Keyword. **For the Interagency Recommendations Project, 39 individual recommendations were synthesized to develop 11 goals.**

In the first phase, in work sessions facilitated by Territory - the project team reflected on the potential impacts and effort associated with implementing each of the goals and began the work of developing strategies together through in depth discussions. All strategies are grounded in the collective knowledge and experience of our operational staff about the current state, the potential barriers and our shared accountability.

What we accomplished … continued

Representatives who participated in these work sessions will continue to meet regularly and work together. The Interagency Recommendations project and the collaboration with Territory was incredibly important to building interdepartmental and functional trust among each organization's leaders.

Going through the recommendations and observations together to identify root causes and develop strategies for how to implement goals that would address them helped participants find ways to reduce fragmentation. While considering which goals would have the highest impact, participants reflected on how best to improve outcomes, advance equity, and promote health and wellness for adults in custody and our staff.

We identified equity questions based on the Multnomah County Equity and Empowerment Lens to frame our discussions and support our work toward shared responsibility and accountability by focusing on:

- Identifying our common goals and opportunities for collaboration.
- Using a strengths based perspective by focusing on what's already been done and what's working well.
- Developing agreement on foundational concepts of our shared goals, vision and values.
- Working on strategies to approach the collaborative work needed to implement goals together.

The agendas for each session can be found at the end of this slide deck.

Meeting participants

Sheriff Nicole Morrissey O'Donnell, MCSO

Katie Burgard, Chief of Staff, MCSO

Jenny Carver, Deputy Chief of Staff, MCSO, Project Lead

Stephen Reardon, Chief Deputy of Corrections Division, MCSO

Alayna Wilson, Equity Analyst, MCSO

Capt. Brian Parks, Multnomah County Detention Center, MCSO

Capt. Kurtiss Morrison, Multnomah County Inverness Jail, MCSO

Katy Bailey, Policy Analyst, MCSO

Curtis Sanders, Corrections Lieutenant, MCSO

Rachael Banks, Multnomah County Health Department Director

Valdez Bravo, Health Department Deputy Director & Interim Director of Corrections Health (MCCH)

Tony Gaines, Deputy Director, MCCH, Project Lead

Eleazar Lawson, Medical Director, MCCH

Halcyon Dodd, Lead Nurse, MCCH

Tim Victorella, Care Coordinator, MCCH

Michelle Cannavino, Behavioral Health Manager, MCCH

Ederlinda Ortiz, Corrections Health Supervisor, MCCH

Tools for Teams

Explore tools, tips, and resources

Within this section, you'll find a variety of resources to help frame, guide, and support your best collaborative work. Dive into the following:

Convene your teams

Center people

Define shared accountability

Gather and set your goals

Consider the context

Move to action

Embrace a growth mindset

Convene your teams

As you continue the work, it will be important to evolve your team norms and participant expectations as you collaborate and move toward action steps that fuel transformation.

Since people are central to all of this work, before you dive into strategic goal setting and action planning, take the time to build relationships with your collaborators, learn more about everyone's strengths and expertise to help choose roles, and decide on ways of working together that best engage participants' attributes and influence. Consider who to add to the mix as the project progresses. New people will add fresh perspectives with their unique expertise, skills, and viewpoints.

Tools and tips:
- Read more about how to set your team's working agreements.
- Check out this sample agenda for ideas on how to structure meetings.
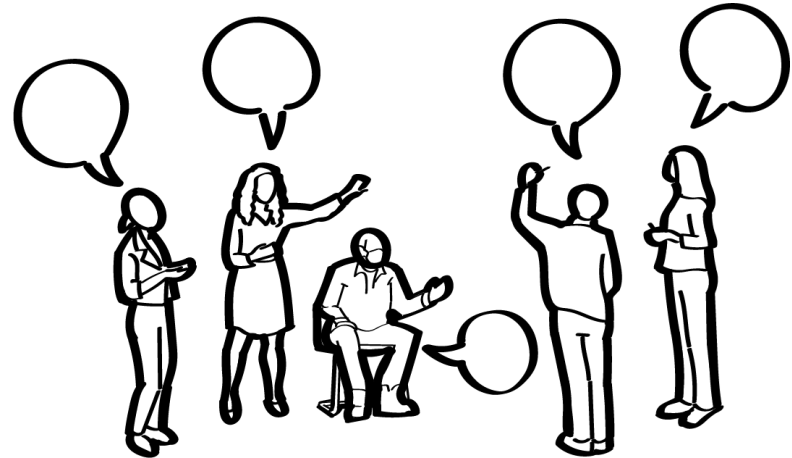- Learn more about running effective meetings.

Shared working agreements

Shared working agreements and team charters are tools to help you collectively establish and document clear expectations that define how you'll operate as a team. When all members have a voice in shaping these agreements, they'll feel valued and are more likely to trust one another.

Co-define goals, priorities, and ways of working so your team can develop a sense of ownership and commitment to the project, to each other, and to your most pressing work.

Documenting your team agreements helps you stay rooted in a shared sense of responsibility towards achieving your collective objectives. Shared agreements also support your team to:
- be more productive and harmonious,
- experience enhanced decision-making,
- resolve conflict more easily, and
- create a warm culture of accountability.

Tools and tips:
- See the Interagency Project Goal Tracker collaborative strategy agreements and considerations section.
- Explore some exercises and work agreement samples for inspiration.

LINK: Click on the image below to go to the online version

Source: Atlassian, The Team Canvas, Plays-In-Business, Team charter canvas

Run effective meetings

Consider these actions to help your team foster a positive experience for productive collaboration.

- Focus on active listening and engagement
- Encourage diverse perspectives
- Ensure equal opportunity to share ideas
- Appreciate and value contributions
- Facilitate cooperation and constructive dialog
- Synthesize and integrate different ideas
- Reach consensus to make best decisions
- Engage in feedback sessions

Source: Purposeful Hustle blog

Activities for effective meetings

ACTIVITY	OUTCOME(S) AND INSTRUCTIONS	RESOURCES
OPEN	**Deepen connections** ● At the beginning of the meeting ask participants to each spend 30 sec sharing something they are working on, are looking to collaborate on, or interested in. This is a share-out, not discussion time. Reserve 15 mins at the end of meeting for folks to follow up with one another on topics shared. **Team health check** ● This activity requires trust. If that exists in the group, then give everyone time to read through the table. Discuss what came up, which areas the group is excelling in, and which areas have room for improvement. Develop an action plan based on this discussion. You can also walk the group through this more directed activity using a presentation guide.	Rapid Coordination Team Health Check Table
EXPLORE	**Brainstorm potential actions** ● Give each person a sharpie and post-it note pad. Participants can write down ideas, or answer a specific question. After 5 mins (or more, depending on the topic), have everyone put their post-it notes on a wall next to an idea similar to their own. **6-8-5** ● Each person brainstorms 6-8 solutions/answers to a question and then shares them with the group. **Nonviolent communication training** ● Develop your team's ability to engage with conflict in a positive way that is clear and compassionate.	6-8-5 Your Complete Nonviolent Communication Guide
DECIDE	**Affinity mapping** ● After brainstorming is complete and many, many ideas are represented, talk about similarities. Do any categories emerge? Can the post-it notes or ideas be narrowed to a smaller number? **Dot voting** ● Each person is given the same number of stickers (or you can use check marks). Participants have 5 mins to review the ideas/post-it notes and vote for those most important to the problem the group is solving.	Affinity Mapping Dot Voting
CLOSE	**Determining next steps** ● Make 3 columns on a dry-erase board or piece of paper. At the top of one column write WHO, the next column WHAT, and the last column WHEN. Start by writing each person's name in the 1st column. Ask each participant what they are committing to do by when. **Evaluating a process** ● Make 3 columns on a dry-erase board or piece of paper. At the top of one column write START, the next column STOP, and the last column CONTINUE. Consider an action, or process as a group and ask, "What should we START doing, what should we STOP doing, and what should we CONTINUE doing?"	Who, What, When Start-Stop-Continue

Center people

This work is about people every step of the way. Those impacted by strategic decisions should help identify their own needs, barriers, and solutions.

As you continue in your planning process, consider:
What groups or individuals will be affected by your work?

How have you asked for their input and listened to them? Are those voices a direct part of your team? Have you met those people where they are rather than making them work more to come to you?

Could you co-create strategies with people whose experience is fundamental to achieving your goals?

Tools and tips:
- See the Interagency Project Goal Tracker equity analysis and collaborative strategy agreements and considerations sections.
- Explore these ideas about how to center the community in your work.
- Discover how incorporating different perspectives and empathy informs better ideation and decision-making.

Relationships are the focus of human-centered design

HUMAN-CENTERED DESIGN

- Amplifies voices of those closest to the problem—those with lived experience alongside those with the power to impact the solutions.

- Defines expertise as proximity to the problem.

- Focuses on needs, motivations, concerns so systems can be reimagined in ways not previously considered.

- Builds relationships and heightens connections through the process. Collaborates to co-produce.

- Diverges from past failures of top-down approach.

- Navigates tension with an empathy lens.

- Adopts new mindsets.

- Gathers more information to move forward.

VS

TRADITIONAL PROBLEM SOLVING

- Decisions made *for* instead of *with* those with lived experience.

- Values external experts reporting what to do, without gaining buy-in from stakeholders and communities in the system.

- Approaches solutions from top-down view without an inclusive process to achieve goals.

- Values volume of quantitative data over qualitative insights.

Collaboration scale: Are you building with affected individuals?

As you continue to approach goals and think through possible actions, consider how you are (or are not) involving affected people and communities.

Some helpful questions might include:
Where do your efforts fall on this scale?
Are you working with or for the community?
Are you including voices from those with lived experience and proximity to the systemic problem?

Inspired by source: Trauma-Informed Oregon, What do you mean by community engagement?

Tools and tips:
- See the Interagency Project Goal Tracker equity analysis and collaborative strategy agreements and considerations sections.

Co-producing

Co-designing

Doing with

Working with, in an equal and reciprocal partnership

Engaging

Consulting

Doing for

Engaging and involving people

Informing

Educating

Coercing

Doing to

Trying to fix people who are passive recipients of service

Use an empathy map

Find people close to and/or affected by the systemic problem. Ask them questions to understand the problem better, and access more empathy in your problem-solving approach.

While filling out this worksheet, consider:
Where might you experience frustration in this process?

What's working really well for you as you navigate this issue?

What information or perspective is missing?

Source: Territory, DesignKit interviews (video)

Tools and tips:
- See the Interagency Project Goal Tracker for more collaborative strategy agreements and considerations guidance.

Define shared accountability

Shared accountability and transparency about how work is being done is crucial to a collaborative and resilient approach for your teams. When you define roles and participation expectations, you'll get to healthy collaboration with more ease and trust intact. Your teams can collaborate effectively from the start, and put individual accountability and consensus-building skills to work.

For every goal, your team could assemble teams to take on designated roles, including selecting someone who will track progress along the way.

Tools and tips:
- See the Interagency Project Goal Tracker.
- Access the Goals Reflection Survey Form.
- Learn more about designating roles and responsibilities.

Seek alignment

Using a checklist at the beginning of a project or action can ensure team alignment, and help define what success will look like.

Try out this one in your collaborative work to see where you align, where you differ, and where you might find surprising commonalities.

Source: Bridgespan

Tools and tips:
- Use this Interagency Project Goal Tracker.

Before moving to action, ask yourself:

☐ Do we agree on the impact we are holding ourselves accountable for? Are there specific populations/ disparities we want to adress?

☐ Have we articulated how we will achieve that impact?

☐ Do we know which specific priorities and work we will focus on?

☐ Have we listed what resources (financial, human, organizational) we will need to pursue this work?

☐ Do we have a measurable way to know we're making progress?

Choose decision-making models

Intentionally choosing a decision-making model leads to better, faster, more inclusive decisions. The model your team uses to determine its goals will help clarify power structures and signal how folks can best contribute to the conversation.

As a collaborative team, explore options to maximize your collective power to meet objectives. These include: different decision-making models, consensus building, *Fist to Five consensus model*, and *consent-based decision making.*

When you agree on how to make decisions together, you'll support clarity and transparency in your collaboration, and likely find it easier to work through conflict and disagreement.
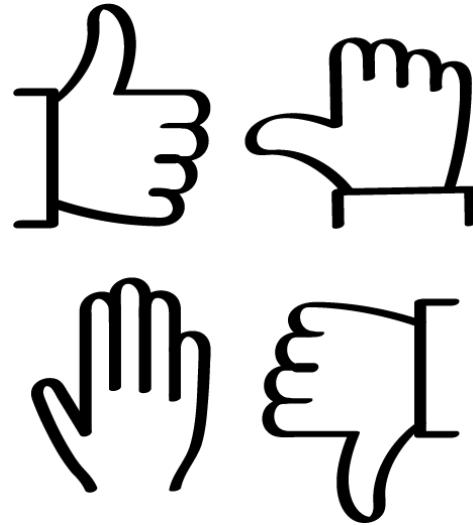
Difficult conversations

When building something new and consequential there will likely be disagreements. While conflict can be uncomfortable, it can also be the spark for positive change, growth, deepened relationships, and a new path to sustainable solutions.

When in conflict, remember to separate the people from the problem, focus on interests rather than positions, and create new options for mutual gain.

Don't shy away from having difficult conversations when progress has stalled, you're experiencing a disagreement, or communication has broken down.

To help be more prepared for the conversation, focus on shared goals, and refer back to your team's agreements.

Seek to understand. Communicate clearly. Co-create solutions.

Before moving to action, ask yourself:

☐ Will having this conversation help us to move forward?

☐ Am I the right person to have this conversation?

☐ Do I feel safe having this conversation?

☐ Can I have this conversation in an empathetic way with an open mind?

☐ Can I accept if the solution we come to isn't the one I had in mind?

Gather and set your goals

Step 1: **Prioritize goals.**

Step 2: **Consider equity, collaboration, and measurable outcomes**. Identify strategies/tactics to achieve goals.

Step 3: **Operationalize and track progress** of the strategies/tactics with a shared project management tool.

Step 4: **Share project progress** with people not directly involved with the work.

Tools and tips:
- Try the Interagency Recommendations Goal Sheet for Step 1.
- Use the Interagency Project Goal Tracker to gather notes for Step 2.
- Use the Individual Goal Plan Template for Step 4.

Frame your work

Short-, medium-, or long-term goals? Your team gets to define the timeframe for the work you're doing based on priorities, urgency, and resources.

Short: Something you can start working on NOW and finish in the near future.

Medium: A goal that can be accomplished in the foreseeable future, but you know it's going to take a while.

Long: A BIG goal, one that there's not a clear roadmap for reaching other than to just start.

Tools and tips:
- View this Impact & Effort Exercise Results - Interagency Recommendations Project for inspiration.

DOWNLOAD: Click on the image below for a printable version

Look back to move forward

While working on complex problems it can sometimes feel like you've hit a wall or challenge that's hard to move beyond.

Sometimes going back to the beginning—exploring what your team collectively knows and what you need to know—can help illuminate a (different, better!) path forward. You can also take time to clarify steps, simplify processes, cut out distractions, and let go of what hasn't worked well.

Tools and tips:
- Learn more from the Interagency Project Session Captures.

DOWNLOAD: Click on the image below for a printable version

Simple storyboard

How will things be different when your team achieves shared project goals?

As you approach strategies and tactics to help achieve shared goals, convene your team to think through the current situation—how you might improve it, and what some effects of those improvements might be on those closest to the experience or solution.

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Divide into bite-sized chunks

You can turn problem-solving into concrete, measurable actions that will lead you towards your ultimate objectives. Each time your team gathers, you can reflect on progress and decide on new actions or approaches that lead you closer to goals achievement.

Set realistic time frames and focused deliverables to keep momentum moving forward for a sustained period of time. Regularly review energy and pace to make adjustments.

Tools and tips:
- View the Impact & Effort Exercise Results.
- Use the Interagency Project Goal Tracker.
- Check out the Individual Goal Plan Template.
- Consider the impact and effort of potential actions your team develops.
- Choose actions and prioritize strategies and tactics that will hit the sweet spot for your goal.
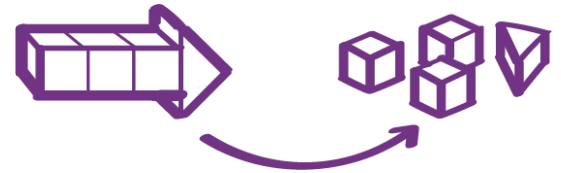
Consider the context

What's standing in your way?

Consider the known barriers for your project goals, and what could help you overcome them. Being part of this collaboration means you have support from Multnomah County and other MCSO and CH project participants to assist in overcoming obstacles, accessing influencers, and finding the best resources to support your work.

Tools and tips:
- Use the Interagency Project Goal Tracker.
- Think through the strengths, vulnerabilities, opportunities, and risks of your chosen actions.

Strengths, vulnerabilities, opportunities, risks (SVOR)

The SVOR analysis tool is geared to help you evaluate and understand key factors affecting your project's or action's environment—as well as its chance for success.

This tool can help your team develop effective strategies, actions, and tactics by leveraging strengths and opportunities while addressing vulnerabilities and mitigating risks. This information is key to your action planning.

DOWNLOAD: Click on the image below for a printable version

Share your plan

When your team has accomplished many of the previous steps in this framework, you might wish share your plan with other project collaborators for insight and feedback to guide fine tuning and inspire celebration.

After sharing your work, you may wish to make some necessary shifts in approach at different stages of the project. These steps help you become clear on shared accountability and best strategies before moving to action and implementation.

Tools and tips:
- This work is hard. Take care of yourself and support each other to avoid burnout.
- Use the Interagency Project Goal Tracker.
- Check out the Interagency Project Goal Status Report.
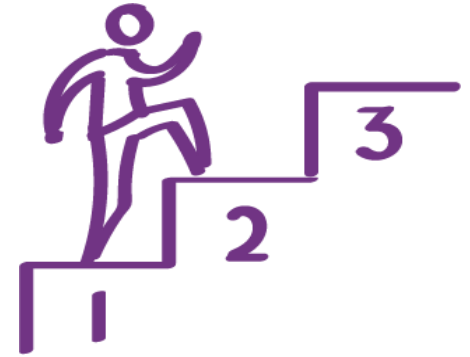
Move to action

How will a specific action support your goal?
How will it develop and strengthen relationships in the process?
*How will it build power for affected communities like AIC and frontline staff?*

Use the **sweet spot** as an additional tool to help you choose which actions will have the greatest positive impact on those closest to the experience.

Tools and tips:
- Use the Interagency Project Goal Tracker.

Inspired by source: Leading Change Network, Organizing: People, Power, Change (pg 36)

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The "Sweet Spot"

CONSIDER:
How will an action support your goal?
How will it develop and strengthen relationships in the process?
How will it build power for affected communities?

SUPPORT THE GOAL

STRENGTHEN RELATIONSHIPS

SWEET SPOT

BUILD POWER FOR AFFECTED COMMUNITIES
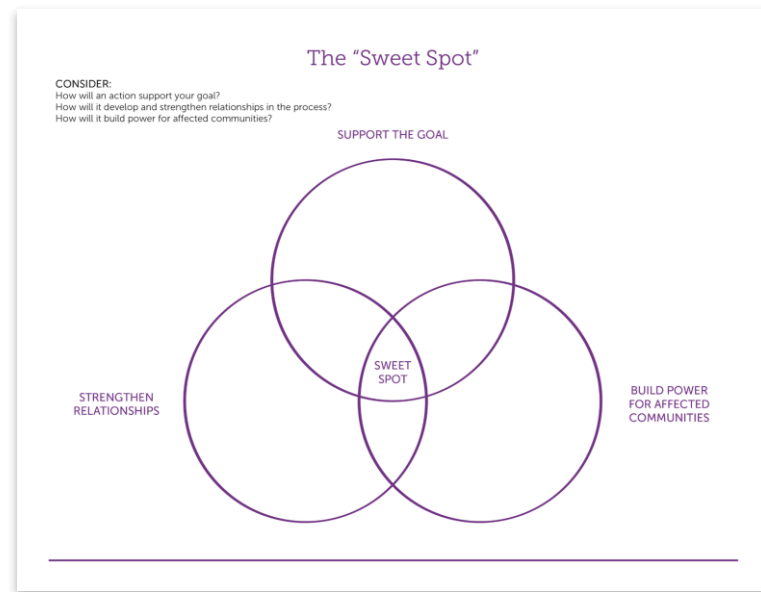
Impact vs effort map

Brainstorm potential actions your team can take to support each goal.

Work with your team to start prioritizing actions by examining the effort they will take in relation to the impact they will provide those closest to the experience or problem.

Tools and tips:
- Use the Interagency Project Goal Tracker.
- Check out the Impact & Effort Exercise Results for the Interagency Recommendations Project.

DOWNLOAD: Click on the image below for a printable version

Embrace a growth mindset

Meeting all the goals set forth from the 2023 NIC report is not a simple, straight forward project.

To remain adaptive and flexible as the project progresses, you'll want to create living documents for teams to update regularly for effective coordination and collaboration.

There's also room and need for continuous improvement. When your team builds in cycles for retrospection and feedback, you'll be reaching beyond milestones reporting to find the practices and processes that work for your team, for this crucial project, and for future collaborations.

Tools and tips:
- Consider meeting quarterly as a team to celebrate what you've accomplished, overcome stalled actions, identify new actions, and continue to support and collaborate with one another in fresh ways.
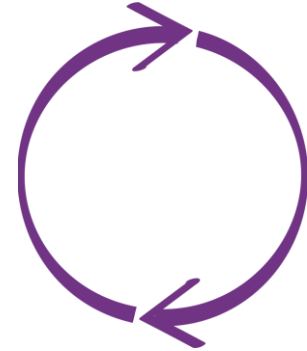
Share stories and celebrate progress

The stories we tell ourselves and others drape our world in meaning. It doesn't matter if a tree falls in the woods, if no one tells the story of how it fell: The story of how it fell gives the action meaning.

Depending on how your project story is told, you can motivate key stakeholders, encourage more people towards action, and positively impact funding. And, you can offer hope to those closest to the experience.

Leaders and stakeholders want to hear your stories, celebrate your achievements, and understand your challenges. They also want to share your success stories with elected officials and the public. Telling a good story makes this easier.
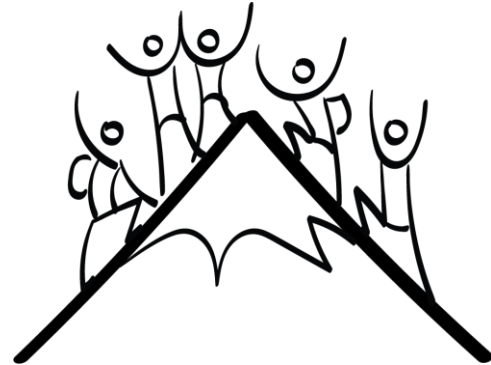
Tools and tips:
- Use the press release to share what your team is working on or celebrating.
- Use the Public Narrative storytelling tool to communicate why your work or action is important.

Resources (within slides)

Interagency Recommendations Project-specific Tools

Impact & Effort Exercise Results

Goals Reflection Survey Form

Interagency Project Goal Status Spreadsheet (In Progress)

Individual Goal Plan Template

Interagency Project Session Captures

Sample Facilitation Draft Agenda

Articles and Activities for Inspiration

Work Agreement Samples
Diverse Perspectives in Meetings
Rapid Coordination
Team Health Check Table
6-8-5
Your Complete Nonviolent Communication Guide
Affinity Mapping
Dot Voting
Who, What, When
Start-Stop-Continue
Community Engagement
Design Kit Interview
Designating Roles and Responsibilities
New Strategy Checklist
Decision-making Models
Consensus Building
Fist to Five Consensus Model
Consent-based Decision Making
Self-Care A-Z
Team Celebrations
Public Narrative Storytelling Tool
Press Release Template

Contact us

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Multnomah County

Session Agendas

Session 1 – Leadership

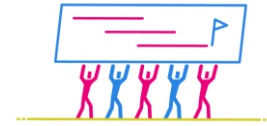| 1:30–1:40	1:40–1:55	1:55–2:00	2:00-2:25	2:25–2:30
Context setting	**Introductions & check-in**	**Ways of working**	**Shared agreements**	**Next steps**
• Jenny and Tony introduce why we're gathering and to-date accomplishments as part of this collaborative project. [Focus: What and why and how and when]	• Participants make self-introductions. • **Prompt:** In one sentence (or better yet, one word) describe why this work matters to you.	• Introduction to the importance of working agreements, stronger collaboration, and clear communication to achieve project goals.	Discussion **prompts:** • Where do they already exist? • What has worked well in the past? • Where should working agreements exist (and in what format)? • What would you like to see included?	• Jenny and Tony close with next steps, expectations, and an invitation to provide additional support and input along the way. [Focus: What and how and when]

• Outcomes:
  ○ Leaders feel briefed and have a basic understanding of project outline and work ahead.
	• Outcomes:
	  ○ Leaders are welcomed to the project and process, and share their personal why/purpose.
		• Outcomes:
		  ○ Leaders see the value of working differently to achieve common goals.
			• Outcomes:
			  ○ Leaders help build scaffolding and feel more invested working collaboratively.
				• Outcomes:
				  ○ Leaders have a clear understanding of the process ahead and are invited to provide input as needed.

territory

Session 2 – Operational Leaders

4:00-4:10	4:10-4:15	4:15-4:20	4:20-5:10	5:10-5:15
Introductions & overview	**Context setting**	**Working agreements**	**Exploring our project goals**	**Next steps**

Introductions & overview

- Participants make self-introductions.
[Name, pronouns, org, title]

- TRTRY team makes introductions and provide overview of agenda.

Context setting

- Introduction to why we're gathering and to-date accomplishments as part of this collaborative project.

Working agreements

- Introduction to the importance of shared agreements, stronger collaboration, and clear communication to achieve project goals.
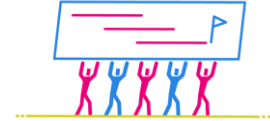
- Introduce Color Brave Spaces (Meeting Agreements)

Exploring our project goals

Work stations around the room, two groups, mix of MCSO and CH.

Discussion prompts:

- Do you agree with the spirit of these aspirations/goals? If not, what is working, what is not working, what should change?

- Where has this work been happening already? Who else should be engaged in this conversation?

- Where has this work stalled?

- What additional work or decisions need to be made for this work to move forward?

Next steps

- Close with next steps, expectations, and an invitation to provide additional input along the way.
- Introductions to the 4 P's (Equity questions)

- Outcomes:
  - Operational leaders are welcomed to the project and process.

- Outcomes:
  - Operational leaders have a strong understanding of project outline and work ahead.

- Outcomes:
  - Operational leaders are invited to work differently to achieve common goals.

- Outcomes:
  - Operational leaders work collaboratively to understand goals for the project and map where work is already happening and areas of improvement.

- Outcomes:
  - Operational leaders have a clear understanding how the shared work will continue in the coming weeks.

Session 3 – Operational leaders

1:00-1:05	1:05-1:20	1:20-1:30	1:30-2:00	2:00-2:15
Introductions & overview	**Exploring our project goals: Round 2**	**Individual reflection & mapping**	**Mapping potential strategies**	**Next steps**

Introductions & overview

- Participants make self-introductions.

[Name, pronouns, org, title]

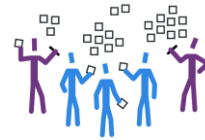- TRTRY team makes introductions and provide overview of agenda.

Exploring our project goals: Round 2

Work stations around the room, two groups, mix of MCSO and CH. Discussion prompts:

- Do you agree with the spirit of these aspirations/goals? If not, what is working, what is not working, what should change?
- Where has this work been happening already? Who else should be engaged in this conversation?
- Where has this work stalled?
- What additional work or decisions need to be made for this work to move forward?

Individual reflection & mapping

- Participants rate each goal on an Effort / Impact chart, according to each individual's experience, role, and perspective.

Mapping potential strategies

Split into groups of 2 or 3 with a Territory scribe:

- Brainstorm potential strategies that can be implemented to meet each goal, one per sticky note.
- Place each strategy sticky note in the Effort / Impact chart, based on what we know so far.

Next steps

- Reflections on how we are working together and how we might work together as we move forward.
- General overview of upcoming meetings.

- Outcomes:
  - ○ Operational leaders are welcomed to the project and process.

- Outcomes:
  - ○ Operational leaders continue to work collaboratively to understand project goals, map where work is already happening, and areas of improvement.

- Outcomes:
  - ○ Operational leaders provide their gut feeling about the effort each goal will require to complete and positive impact each completed goal will have.

- Outcomes:
  - ○ Operational leaders work collaboratively to dive deeper into how they will need to work together to reach goals

- Outcomes:
  - ○ Operational leaders have a clear understanding how the shared work will continue in the coming weeks.

Session 4 – Organizational leaders

12:00-12:05	12:05-12:25	12:25-12:50	12:50-12:55	12:55-1:00
Introductions & overview	**Playbook draft review**	**Shared mission, vision, values review**	**MultCo & CH MOA/MOU discussion**	**Next steps**

Introductions & overview

- Participants make self-introductions.
  [Name, pronouns, org, title]
- TRTRY team makes introductions and provides agenda overview.

Playbook draft review

Discuss the draft playbook and gather feedback.
- Are there other pieces of information we should be collecting?
- Other questions we should ask?

Shared mission, vision, values review

Discuss shared mission | vision | values language
- What works?
- What is missing?
- What is some language/concepts you'd like to see included?
- Who else needs to be brought into the conversation? (Sheriff: front line workers)

MultCo & CH MOA/MOU discussion

Discuss use of MOA as a way of explicitly stating working agreements to begin the work.

In the interest of time, TRTRY team will:
- Review examples of sections from some current MOA/MOUs and create a template for moving this work forward.

Next steps

Close with next steps, expectations, and an invitation to provide additional input along the way.

- Outcomes:
  - New organizational leaders are welcomed into the process.

- Outcomes:
  - Organizational leaders will have a better sense of the work so far, and how it's being organized.

- Outcomes:
  - Agree on these three foundational concepts to move into operationalizing the collaborative work.

- Outcomes:
  - Shared agreement to move forward with MOA/MOU model as a template for MCSO and CH to use for creating their working agreements.

- Outcomes:
  - Organizational leaders have a clear understanding how the shared work will continue through the project and beyond.
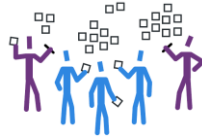
Session 5 – Operational leaders

12:00-12:05	12:05-12:20	12:20-12:30	12:30-12:35
Introductions & overview	**Review Impact v. Effort Heat Map**	**Intro to Playbook**	**Personal reflection**

Introductions & overview

● Participants make self-introductions.

[Name, pronouns, org, title]

● TRTRY team makes introductions and provide overview of agenda.

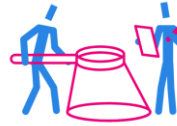**Review Impact v. Effort Heat Map**

Discuss the visual and gather feedback.

● Do these infographics accurately reflect the effort and impact of the goals as defined in the last session?

● Understanding that the collaborative work is to address each of these goals over time, which would you prioritize to approach and complete sooner?

Intro to Playbook

Gather feedback on the tool we will use to record the information we have gathered so far.

● Are there other pieces of information we should be collecting?

● Other questions we should ask?

Personal reflection

Reflect and self-assign to goals.

● Which goals are you most interested in working on and moving forward?

● Which goals do you have the power to affect, control, influence, and steer?

● Which goals could be supported by your expertise?

• Outcomes:
  ○ New operational leaders are welcomed into the process.

• Outcomes:
  ○ Participants will confirm outcomes of previous exercises, and a start at prioritization.

• Outcomes:
  ○ Participants will have a better sense of the work so far, and how we are organizing it.

• Outcomes:
  ○ Participants will have a better sense of which goals they can/will focus their efforts

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Session 5 – Operational leaders, continued

12:35-12:45	12:55-1:25	1:25-1:30
**Shared Purpose	Vision	Values: review**	**Goal review**	**Closing retrospective**

Agree upon shared purpose, vision, values statements

- What resonates in these statements for shared work?
- What concepts or language are missing?

Brainstorm strategies to approach goals.

- Do these infographics accurately reflect the effort and impact of the goals as defined in the last session?
- Understanding that the collaborative work is to address each of these goals over time, which would you prioritize to approach and complete sooner?

Celebrate the progress made over the course of the project.

• Outcomes:
  ○ Participants will have a foundation to use when crafting MOA (shared working agreements), and a document of record to rely on during work sessions.

• Outcomes:
  ○ Participants will have a better sense of processes and strategies (tactics) to approach collaborative work (addressing goals).

• Outcomes:
  ○ Participants feel accomplished and motivated to continue the work.

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Individual Goal Plan Templates

Individual Goal Plans are designed to capture the essential elements of the plan to implement each goal.

Most of the elements are based on discussions with the assigned workgroup. This slide deck includes the Goal Plan templates themselves as well as a short description for what each section will include.

[GOAL ID]	[STATUS]

[Headline]

[Full text]

Assigned workgroup: [text]

NEXT UPDATE MM/DD/YYYY	IMPACT	EFFORT	TIMEFRAME
	Low	Low	Immediate (0-3 mo.)
	Medium	Medium	Short (3-6 mo.)
	High	High	Mid (6-12 mo.)
			Long (12+ mo.)

STRATEGIES

[Strategy text]
[Strategy text]
[Strategy text]
[Strategy text]
[Strategy text]
[Strategy text]

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Equity considerations

[Text]

Root cause analysis & challenges

[Text]

Budget discussion

[Text]

Future focus

[Text]

[GOAL ID] [STATUS]

[Headline]

LEAD	SUPPORT
[Name or Organization]	[Name or Organization]

THEME, CATEGORY, KEYWORDS
- [Text]
- [Text]
- [Text]

REFERENCING DOCUMENTS & REC. IDS
- [Text]
- [Text]
- [Text]

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The Goal ID is a unique number assigned to each goal in the Corrections Recommendations Project 2024.

The Status is updated monthly and indicates what stage the Goal itself is currently in. The Next Update indicates the next time the project management anticipates an in depth update.

The Headline is a 1-2 sentence summary of the goal itself. The Full Text includes a detailed description of the goal.

The Assigned Workgroup indicates the project team working to move the goal toward implementation.

The Impact and Effort is assigned for each goal based on individual reflections from workgroup participants.

The Timeframe **is assigned by the workgroup and anticipates how long the goal will take to implement.**

The Strategies are developed by the workgroup and lay out how the goal will be implemented.

[GOAL ID]			[STATUS]	STRATEGIES
[Headline]				[Strategy text]
[Full text]				[Strategy text]
Assigned workgroup: [text]				[Strategy text]
NEXT UPDATE MM/DD/YYYY	**IMPACT** Low Medium High	**EFFORT** Low Medium High	**TIMEFRAME** Immediate (0-3 mo.) Short (3-6 mo.) Mid (6-12 mo.) Long (12+ mo.)	[Strategy text] [Strategy text] [Strategy text] [Strategy text] [Strategy text] [Strategy text] [Strategy text]

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The Equity Considerations **summarize workgroup discussions based in part on these questions:**

- Who will be impacted and how?
- Does the decision prioritize individual emotional and physical safety?
- How will the proposed strategies impact interagency communication?
- How does it align with current working agreements?
- What barriers do we anticipate? What benefits?
- What does accountability look like?

The Budget Discussion **provides a summary of budgeted resources and anticipated future budget requests.**

The Future Focus **provides a forward looking statement that captures what the workgroup sees as a possibility in the future related to the goal.**

Equity considerations

- [Text]
- [Text]
- [Text]

Root cause analysis & challenges

- [Text]
- [Text]
- [Text]

Budget discussion

- [Text]
- [Text]
- [Text]

Future focus

- [Text]
- [Text]
- [Text]

[GOAL ID]

[STATUS]

[Headline]

LEAD
[Name]

SUPPORT
[Name]
[Name]
[Name]
[Name]

THEME, CATEGORY, KEYWORDS
- [Text]
- [Text]
- [Text]

REFERENCING DOCUMENTS & REC. IDS
- [Text]
- [Text]
- [Text]

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Continued…

The <u>Root Cause Analysis & Challenges</u> summarize workgroup discussions about how the goal addresses recommendations and observations from the <u>Referencing Documents</u> and detailed recommendations.

<u>Recommendation Ids</u> are unique numbers assigned to each observation/recommendation from the evaluations. For example, the recommendation to "replace sprinkler heads" from the <u>National Institute of Corrections Report (2024)</u>.

In addition to Recommendation Ids, each observation/recommendation is assigned a <u>Theme, Category and Keywords</u> **in order to develop the goals and assign them to workgroups.**

| Equity considerations | | [GOAL ID] | [STATUS] |

- [Text]
- [Text]
- [Text]

Root cause analysis & challenges

- [Text]
- [Text]
- [Text]

Budget discussion

- [Text]
- [Text]
- [Text]

Future focus

- [Text]
- [Text]
- [Text]

[Headline]

LEAD	SUPPORT
[Name]	[Name]
	[Name]
	[Name]
	[Name]

THEME, CATEGORY, KEYWORDS
- [Text]
- [Text]
- [Text]

REFERENCING DOCUMENTS & REC. IDS
- [Text]
- [Text]
- [Text]

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