
Oregon Shines III: A Systems Approach to Well-being

Presentation on July 10, 2008
2008 Fulbright Symposium
Flinders University
Adelaide, S. Australia,

By Rita Conrad, Executive Director
Oregon Progress Board

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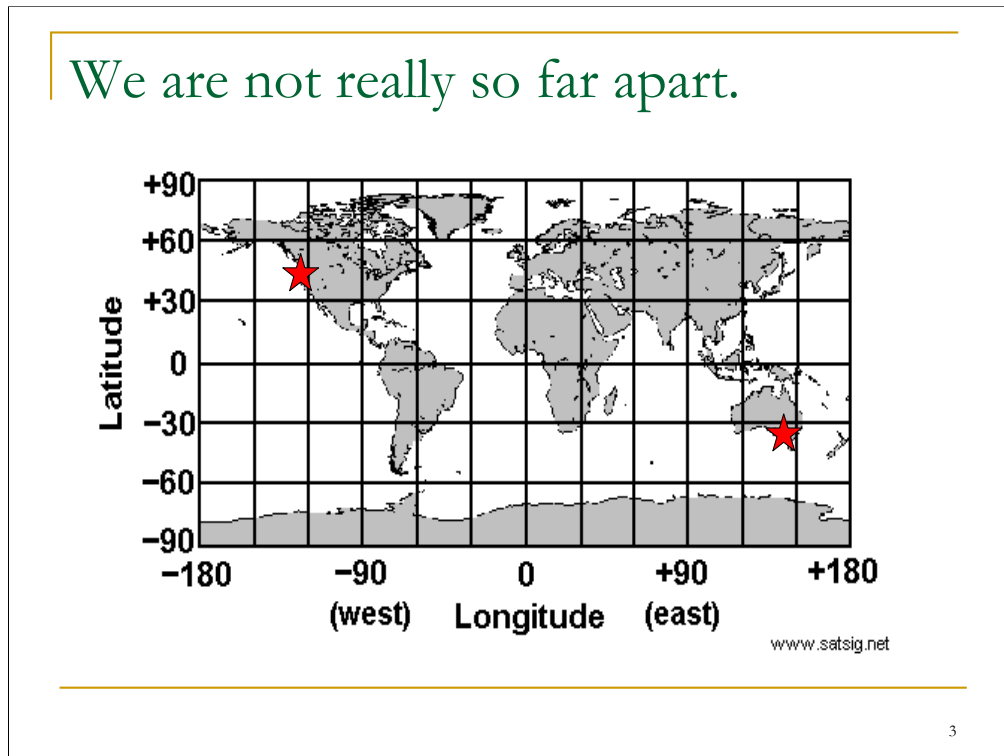


The color of my
face on July 3rd

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First, let me clear the air. Michael Bentley's politeness may not have allowed him to tell you that 24 hours before my flight to Australia, I realized I had not renewed my U.S. passport. As you know, the authorities are unforgiving on this score, and we were forced to postpone the flight.

Thank you so much, Michael, for handling my unforgivable blunder with such grace and kindness. To those of you in the audience, thank you for your patience with this presentation by a disembodied voice. I hope that it will inspire your thinking as you continue the good work you are doing there in South Australia.



S. Australia and Oregon are about as far away as they can get on the world map. Yet I believe we are not really so far apart in spirit.

Like S. Australia, Oregon has a societal strategic plan.

And what I have read about this conference and the “whole-of-government” policy in Adelaide tells me that S. Australians are progressive thinkers.

You wouldn't be in this room if at some level you didn't resonate with the idea that **everything is connected to everything else.**

The story of Oregon Shines III

- How we usually do Oregon Shines
- What we need to conserve
- What we need to add and why
- Can we pull it off?



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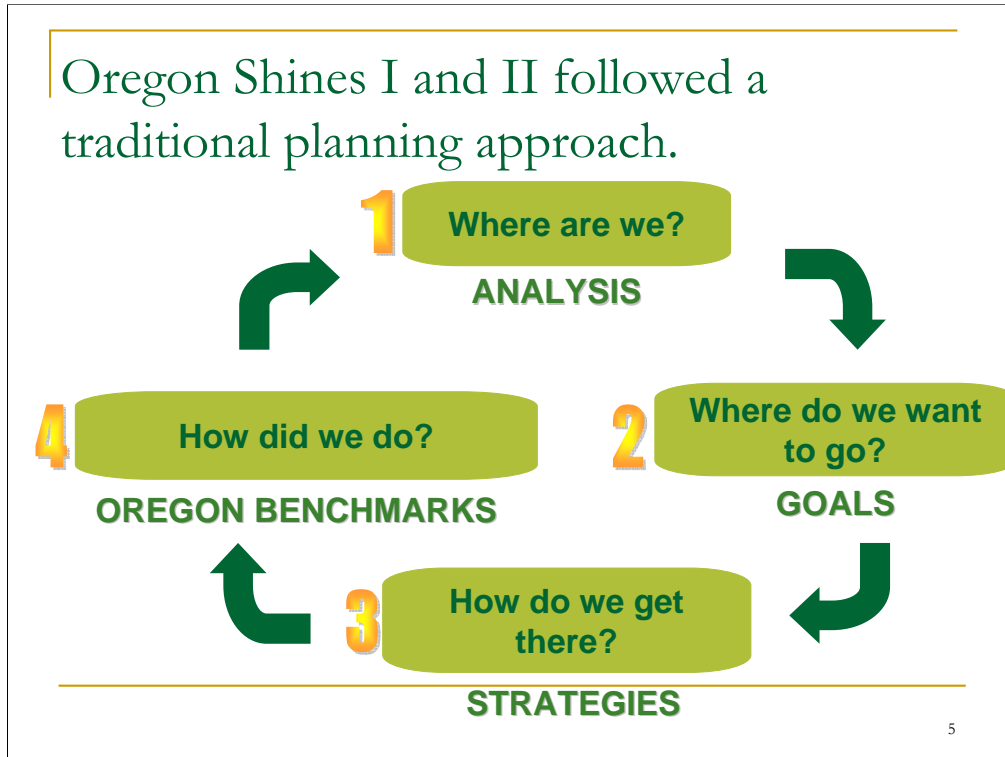
We call our state plan “Oregon Shines.” Oregon’s governor and legislature created Oregon Shines I in 1989 ... and then they created an independent Oregon Progress Board to make sure it didn’t just sit on the shelf.

The board does that primarily by reminding Oregonians every two years how they are doing. We use data from 91 indicators called the Oregon Benchmarks to issue grades on Oregon’s progress.

The state plan was updated in 1997. We are now getting ready to do Oregon Shines III – the 2nd update to synch the plan to new realities of the 21st century.

A lot has changed since 1997.

The Oregon Progress Board is proposing new elements in the Oregon Shines III design. **This slide show is about that story - how we have done Oregon Shines in the past; what we need to conserve from that past; what we need to add to it and why; and whether we can pull it off!**



Oregon Shines I (1989) and II (1997) were traditional planning exercises.

They analyzed where Oregon was, where it wanted to go and suggested strategies for getting there.

Both exercises resulted in quantitative measures of progress, the Oregon Benchmarks.

We do Oregon Shines with lots of people.



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Our traditional approach is a textbook example of inclusivity - lots and lots of people were engaged in the process.

Both Oregon Shines I and II relied on extensive input from expert stakeholders and from civic leaders and citizens across the state.

We measure and report progress using 91 Oregon Benchmarks.

1. **ECONOMY:** Rural employment, trade, new business, job growth, professional services, economic diversification, research & development, venture capital, cost of doing business, regulatory burden, income, wages, income disparity, working poor, unemployment, exports, foreign language
2. **EDUCATION:** ready to learn, 3rd & 8th grade reading and math, CIM, dropouts, HS and college completion, adult literacy, computer/Internet usage, labor force skills training
3. **CIVIC ENGAGEMENT:** volunteering, voting, feeling of community, understanding taxes, taxes per income, public management quality, S&P bond rating, arts, libraries
4. **SOCIAL SUPPORT:** teen pregnancy, prenatal care, infant mortality, immunizations, HIV, smoking, premature death, perceived health status, child care slots and affordability, teen substance abuse, child abuse, elder abuse, alcohol and drug use while pregnant, poverty, health insurance, homelessness, child support, hunger, seniors living independently, working disabled, disabled living in poverty
5. **PUBLIC SAFETY:** overall crime, juvenile arrests, students carrying weapons, adult and juvenile recidivism, emergency preparedness
6. **COMMUNITY DEVELOPMENT:** traffic congestion, drinking water, commuting, vehicle miles traveled, road and bridge condition, home ownership, affordable housing
7. **ENVIRONMENT:** air quality, CO2 emissions, wetlands gain/loss, stream water quality, in-stream flow rights, agricultural lands, forest lands, timber harvest, municipal waste disposal, hazard substance cleanup, freshwater/marine/terrestrial species health, natural habitat, invasive species, state park acreage

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The Progress Board strives to keep Oregon Shines alive in the minds of Oregonians by reporting actual data on how we are doing as a state. We issue grades based on progress towards our own self-imposed benchmark targets for economic, social and environmental well-being.

The 91 Oregon Benchmarks are organized in seven categories.

The seven benchmark categories are organized under three OSII goals.

Jobs

**Economy
Education**

Communities

**Civic Engagement
Social Support
Public Safety**

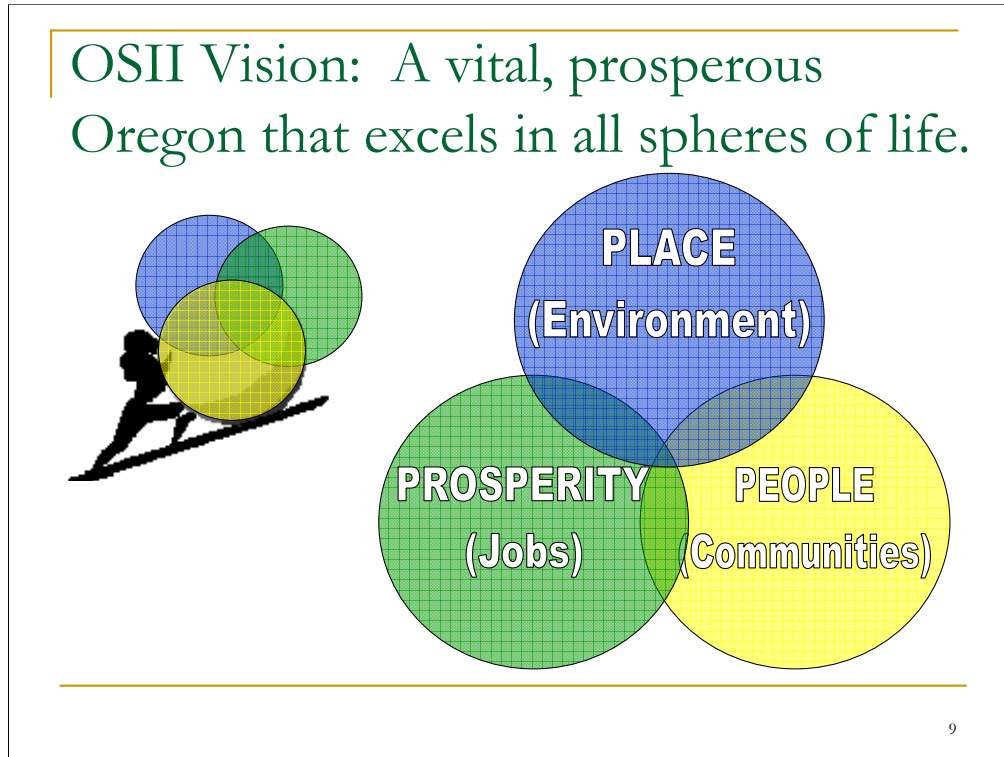
Environment

**Built
Natural**

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The seven benchmark categories are organized under the three goals of Oregon Shines II, which are:

1. Quality **jobs** for all Oregonians
2. Engaged, caring and safe **communities**
3. Healthy, sustainable surroundings (**environment**)



The three goals represent the “triple bottom line” for Oregon and are the essence of the Oregon Shines II vision, which is:

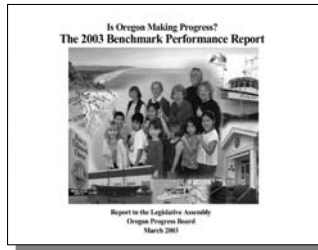
“A vital, prosperous Oregon that excels in all spheres of life.”

We know that the three goals are interdependent. So the idea is to push all three of them up the hill *at the same time*.

We release benchmark reports every two years.



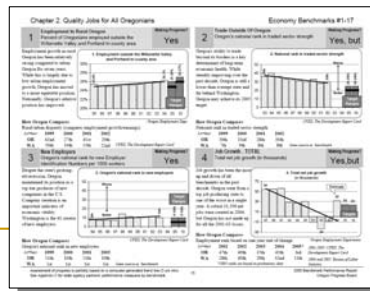
2001



2003



2005

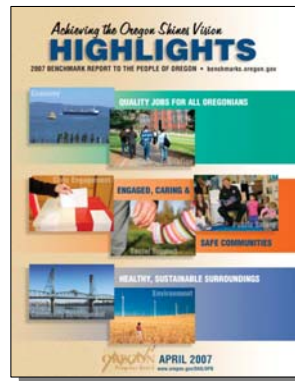


These are the benchmark performance reports that I was lead author on in years past.

They were packed with over 100 pages of black and white bar charts and analyses, national comparators and grades.

Each one was in printed form only. This froze the data for two years.

The Progress Board finally joined the 21st century.



2007

benchmarks.oregon.gov

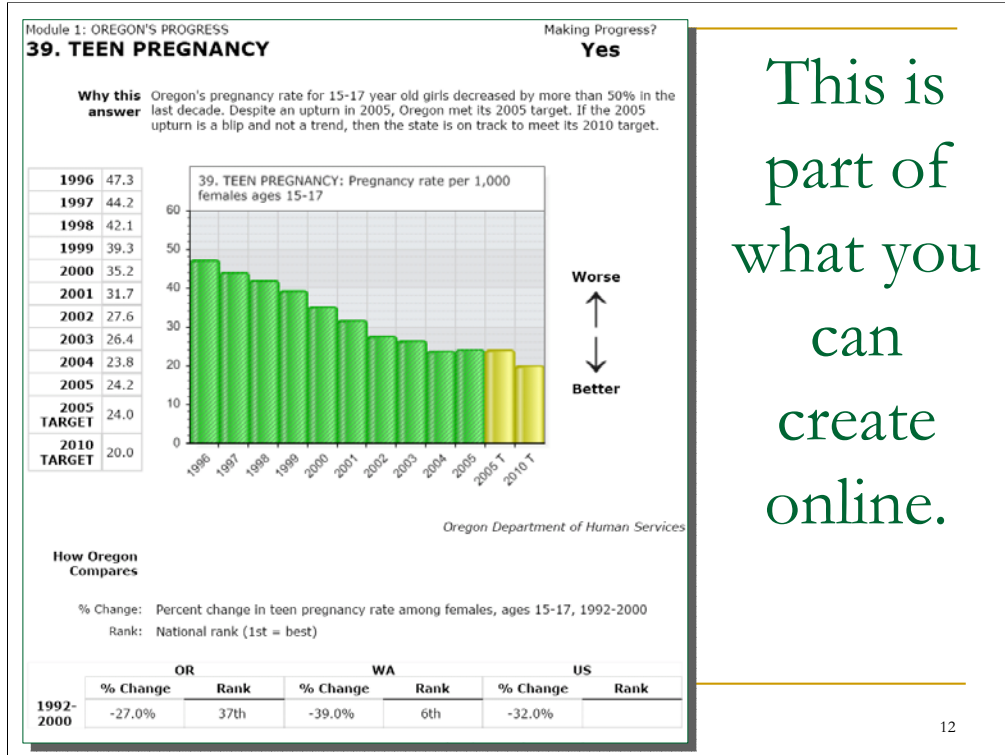
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In 2007, with a tiny bit of money, a very talented E-gov intern created Oregon's first-ever 24/7 **online benchmark report generator**.

This allowed us to make 2007 printed report a colorful and short "snapshot" of how Oregon is doing.

It pointed to all the detailed data and charts available online at **benchmarks.oregon.gov**.

The online benchmark report generator also allows drill-down to state agency performance metrics and is continually updated as new benchmark data points become available



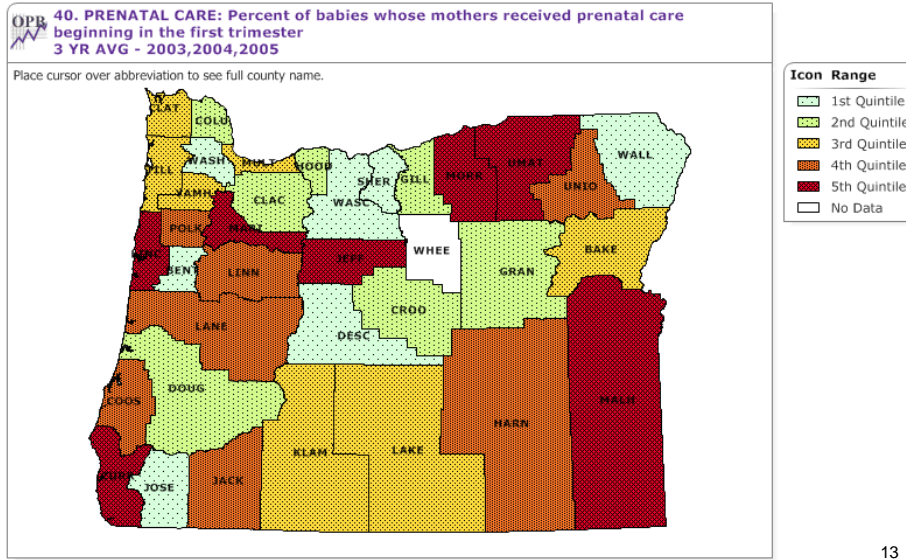
This is part of what you can create online.

This is just part of what you can generate online – benchmark data and targets, the bar chart, national comparators and the “grade” we give the state on whether it’s making progress against its own target.

In the case of Teen Pregnancy, the grade was “Yes,” the state was making progress. We collectively met our 2005 target.

(Targets are shown in the yellow bars.)

You can also get county data.



You can also get county data. The Progress Board’s mission is ***“To make Oregon Shines a reality and the benchmarks useful tools for Oregonians working to improve their communities.”***

To do that, local communities need local data. So where we can, we break about 30 of the 91 state benchmarks down to the county level. Anyone can click to get maps like this and other county tools.

This map shows county data for prenatal care. Blue is best and red is worst.

We have received testimonials on how county data helps local communities focus on shared vision and goals.

What we are conserving from Oregon Shines I and II

- The inclusivity of the process
- The holistic nature of the goals & benchmarks
- The idea that they are interdependent
- The continual benchmark reporting
- Tying government metrics to the benchmarks
- And especially the local data for local action!

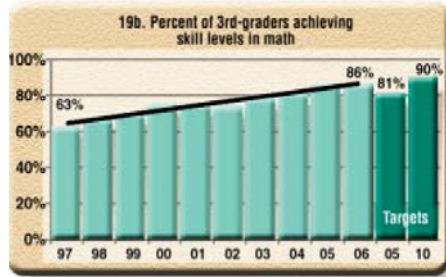
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People from all over the world study our unique Oregon benchmark system.

So we know in our bones that there is much to conserve in how we currently do Oregon Shines - the inclusivity of the process, the holistic and interdependent nature of the Oregon Shines goals and benchmarks, the continual benchmark feedback we give to the state and *especially* the local data.

However, we think that Oregon Shines could be even better.

BIGGEST IMPROVEMENT IN EDUCATION:



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

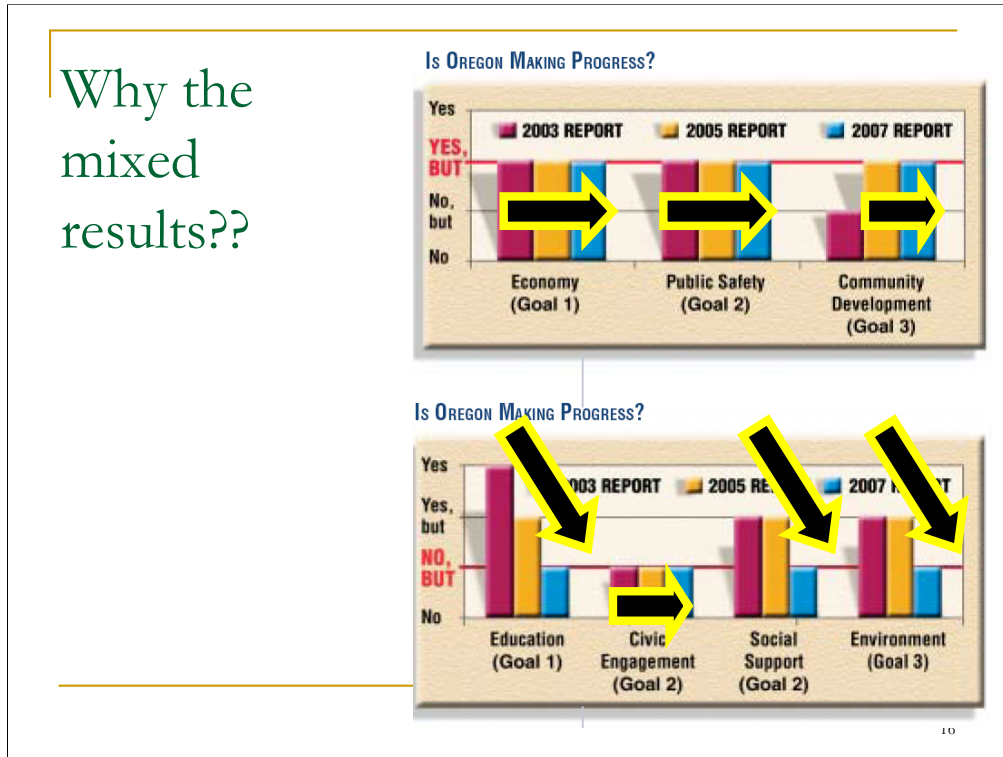
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However, we think that Oregon Shines III can be even better.

These graphics from the 2007 Benchmark Report illustrate that while progress in many specific benchmark areas has been made, progress across the family of benchmarks remains illusive.

We easily met our target for 3rd grade math, for example, but the adult education indicators pulled the overall education grade down to negative territory.

Why the mixed results??



The high-level summary from that same report shows a drop in progress from previous reports for three of seven benchmark categories: education, social support and environment.

So despite all this work – two decades of plans, plan updates, the linking of government work to the benchmarks, benchmark publications and a well-used online benchmark report generator - Oregon’s actual results for overall well-being are still mixed.

WHY???

Seven expert partner panels came up with one consistent theme:

- ***Oregon needs to invest in collaboration, systems thinking and prevention.***

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To set the stage for Oregon Shines III, the Progress Board completed an 18-month series of quarterly “partner panels” in all the benchmark categories (economy, education, so forth).

Over 40 policy experts in and out of government were asked to tell the board what they thought the critical issues should be for Oregon Shines III. A common theme emerged from all panels: ***Oregon needs to invest in collaboration, systems thinking and prevention.***

- The Progress Board learned from the education panel that **Oregon’s education, public safety and social support systems cannot be fixed independent of one another.**
- The social support panel said that a **culture change is necessary across all sectors, as no single sector has the solution.**
- Members of the public safety partner panel said that **in order to reduce recidivism, released inmates need mental health and drug treatment, housing, and income.**



ODFW
OWR
ODEQ
OWEB
ODF
DLCD

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

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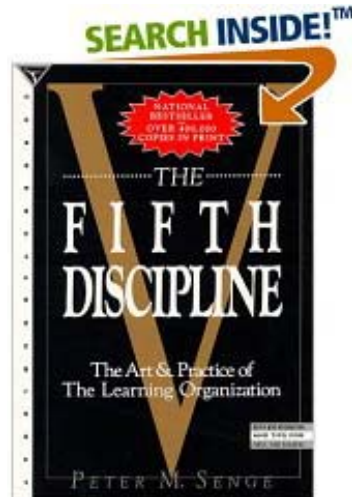
And here's my favorite. During the environmental partner panel, a beloved and dedicated public servant nearly yelled at the board, saying:

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

You should know that in Oregon we have a *separate* agency for fish and wildlife, another for water resources and yet another for environmental quality.

This is in addition to the Watershed Enhancement Board, the Department of Forestry and the Department of Land Conservation and Development.

So began my learning journey.
I re-read Peter Senge's *Fifth Discipline*.



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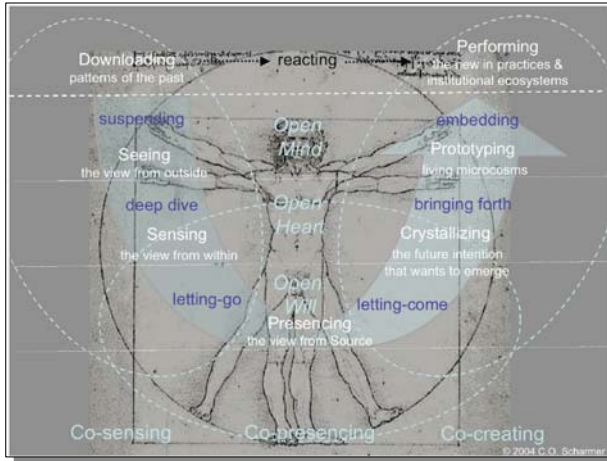
So it appeared that we had work to do. It seemed that systems thinking was a big part of the answer to why we were having mixed results in Oregon. Since I didn't know much about it, I launched myself on a learning journey about whole systems change.

I discovered there was a huge field of "systems thinking" knowledge and expertise out there.

I attended the annual Pegasus Conference on "Systems Thinking in Action" in Seattle.

I re-read Peter Senge's *Fifth Discipline*.

I introduced myself to Otto Scharmer and the *U-Theory*



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I started to learn about Otto Scharmer's U-Theory.

(I am still working on that!)

I met lots of systems thinkers.



Dennis Sandow



Anne Murray Allen

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And I met lots of systems thinkers, two of whom live in our own backyard.

I learned that improving results means we have to be able to *see the system*.

SEEING THE SYSTEM

- There are systems within systems, within systems.
- Life happens. Systems are constantly changing.
- Causation is intricate and non-linear.
- A small event can cause a big, unexpected result down the line.
- Consequences can be far removed in time and place from the original action.
- Data are critical for seeing the system.

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Now I know just enough to be dangerous. I learned that improving results means we have to be able to *see the system*.

This is what that means to me:

- There are systems within systems, within systems.
- Life happens. Systems are constantly changing.
- Causation is intricate and non-linear.
- A small event can cause a big, unexpected result down the line.
- Consequences can be far removed in time and place from the original action.
- Data are critical for seeing the system.

And that we are actually in the system that we are trying to see.

SEEING OURSELVES IN THE SYSTEM

- We are all interconnected in social network systems.
- Knowledge of the system is dispersed in everyone.
- In order to improve outcomes, we must continuously learn from each other.
- Big results happen in informal horizontal relationships, not in formal vertical organizations.
- Data are critical to help us see ourselves in the system.

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I also learned that we are actually in the system that we are trying to see.

To me this means that:

- We are all interconnected in social network systems.
- Knowledge of the system is dispersed in everyone.
- In order to improve outcomes, we must continuously learn from each other.
- Big results happen in informal horizontal relationships, not in formal vertical organizations.
- Data are critical to help us see ourselves in the system.

No wonder plans sit on the shelf.

- The main pitfall of planning ... is falling into the delusion that planning can determine outcome.

The Pitfalls of Planning by [Arlene Goldbard](#)

<http://www.nea.gov/resources/Lessons/GOLDBARD.HTML>

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As I gradually internalized all that, I began to think: “No wonder plans sit on the shelf!”

Let me read you this full quote from Alrene Goldbard:

“The main pitfall of planning - the one from which all others derive - is falling into the delusion that planning can determine outcome.

“The error of this proposition is commonplace. In 17th century Japan, Ihara Saikaku wrote ‘There is always something to upset the most careful of human calculations.’

“Robert Burns, the bard of 18th century Scotland, put it as follows: ‘The best laid schemes o’ mice and men...’

“I cannot name the late-20th century wit who coined the resonant phrase ‘**Shit happens,**’ but whatever elegance it lacks ... it more than makes up in economy of expression.”

Systems thinking provides tools to help us bring in the future in a better way – and with better outcomes.



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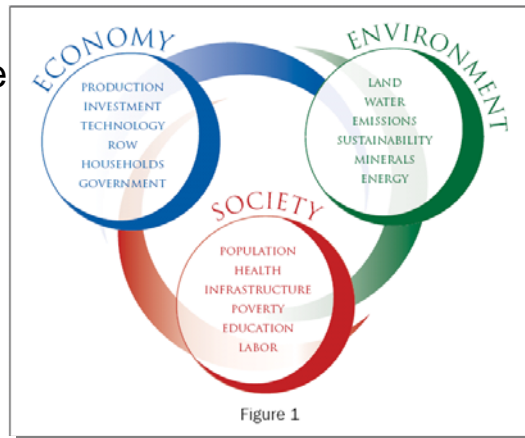
I believe that our policies, directions, decisions are not nearly as effective as they could be because they aren't based on an understanding of how the systems that effect change are tied together. These systems are intricate, complex, interwoven and are not well-addressed by the standard, traditional planning process.

It's only been in the last few decades that the concept of systems thinking - the systems approach to understanding policy, direction, decisions - has been growing. There is now a mature discipline that goes with systems thinking and learning organizations. There are symbols and methods and tools and techniques that have been developed. Those elements include both data-based simulations and people-based processes. Both are critical.

What I am saying to you today is that I believe **systems thinking offers tools to help us bring in the future in a better way and with better outcomes.**

One of them is “systems dynamic modeling.”

- It helps us see the system
- It uses the same three spheres as OSIII.
- It elicits knowledge of the system from the people in the system.
- It simulates the future and allows “what if” scenario planning



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One of those tools is called “systems dynamic modeling.” Systems dynamic modeling was originally developed at MIT. A growing number of practitioners are using it to build tools that help people understand complex patterns, problems, and decisions.

The Millennium Institute has a specific model used for governments that caught our eye.

The tool supports inclusive, comprehensive planning and is based on the principles of systems thinking.

It uses the same three spheres as Oregon Shines.

It elicits knowledge of the system from the people in the system.

It simulates the future and allows “what if” scenario planning

It helps to identify highest-leverage areas of action.

It can be used at all levels to better understand the long-term and unanticipated consequences of actions and policies.

The Millennium Institute has used this tool in many developing countries and the U.S. for nearly 20 years. This model found, for example, that if Pakistan educated its girls, its men would live 20 years longer.

Another tool is studying and amplifying local accomplishments



Helps us see ourselves in the system.

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Here's what we believe is another important missing piece of past Oregon Shines efforts: ***We have never sought a good understanding of what is actually working in Oregon communities and institutions that is advancing the statewide goals and benchmarks.***

People and organizations typically follow a problem identification approach and assume that change is the solution. ***Oregon Shines III adds another assumption - that conservation and expansion of what currently works is also important.***

This process will engage local communities and elected officials in a positive way, offer policy opportunities that are based on experience and improve performance by helping communities learn from one another.

We propose using ***social action research*** to do this. Social action research is a rigorous method of listening and documenting how work happens through interviews and learning dialogues. Just the act of doing this has the effect of expanding performance and well-being within those networks.

The research also affirms that big, significant accomplishments happen in social action networks, not in isolated, vertical organizations.

Expanding educational services

- Rogue Community College expanded educational services to Jackson County students



Case study #1

ECONOMY BENCHMARKS

- #1 Employment In Rural Oregon
- #3 New Employers
- #9 Cost Of Doing Business
- #12 Pay Per Worker
- #14 Workers Above Poverty
- #15 Unemployment

EDUCATION BENCHMARKS

- #20 8th Grade Reading And Math
- #22 High School Dropout Rate
- #23 High School Completion
- #24 Some College Completion
- #25 Postsecondary Credentials
- #26 College Completion
- #27 Adult Literacy
- #28 Computer/Internet Usage
- #29 Labor Force Skills Training

SOCIAL SUPPORT BENCHMARKS

- #49 Positive Youth Development
- #54 Poverty

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So Oregon Shines III is based in part on the assumption that local communities can offer valuable experience to others on how to advance economic, social and environmental well-being. We decided to test that assumption with a few case studies.

Here's case study #1 - Rogue Community College, after 12 years of community collaboration and legislative work, was able to expand educational services to Jackson County students – to two counties, not just one.

This project impacts six economy benchmarks, nine education benchmarks and two benchmarks in social support. I would also wager it impacts public safety (crime) benchmarks, even though that is not listed here by the researcher.

Transforming a timber-based economy

- Wallowa Resources is transforming that area's natural resource extraction economy



Case study #2

OREGON BENCHMARKS

- #1 Employment In Rural Oregon
- #3 New Employers
- #6 Economic Diversification
- #7 Research And Development
- #8 Venture Capital Investments
- #9 Cost Of Doing Business
- #11 Per Capita Income
- #12 Pay Per Worker
- #14 Workers Above Poverty
- #15 Unemployment
- #29 Labor Force Skills Training
- #32 Feeling Of Community
- #49 Positive Youth Development
- #54 Poverty
- #72 Road Condition
- #78 Wetlands
- #79 Stream Water Quality
- #82 Forest Land
- #83 Timber Harvest
- #86 Freshwater Species
- #88 Terrestrial Species
- #89 Natural Habitats
- #90 Invasive Species

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Wallowa Resources is based in the far northeast corner of Oregon in a heavily forested and beautiful mountain area. In the 1980s and prior, like much of rural Oregon, this area's economy was largely driven by the timber industry.

Wallowa Resources now works to transform that economy to one based on restoration, entrepreneurship, and land management.

It impacts a total of 23 Oregon Benchmarks in economy, education, social support, community development and the natural environment.

Turning cooking oil into fuel

- SeQuential Biofuels turns cooking oil to locally consumed energy.



ECONOMY BENCHMARKS

- #1 Employment In Rural Oregon
- #6 Economic Diversification
- #8 Venture Capital Investments

CIVIC ENGAGEMENT BENCHMARKS

- #30 Volunteering
- #32 Feeling Of Community

ENVIRONMENTAL BENCHMARKS

- #76 Air Quality – New Science
- #77 Carbon Dioxide Emissions
- #81 Agricultural Lands

Case study #3

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Finally, Sequential Biofuels is a demonstration of Oregon's leadership in creating and consuming locally generated biofuels. It turns cooking oil into energy.

The SeQuential project impacts eight Oregon Benchmarks in economy, civic engagement and the natural environment.

Common among all case studies

- They improve life in their local communities.
- They use metrics to improve performance.
- They impact multiple Oregon Benchmarks.
- They involve collaboration across all sectors.



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As different as these case studies are in subject and location, they reveal some commonalities that validate the underlying premise of Oregon Shines III.

They improve life in their local communities.

They use metrics to improve performance.

They impact multiple Oregon Benchmarks in a whole system way.

They involve collaboration across private, governmental, educational and not-for-profit organizations.

We want to capture and link many more like these in an online **Infrastructure for Results.**

- Enhanced, collaborative Web presence linking
 - Doers to benchmarks
 - Doers to doers
 - Policy makers to new information

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We want to capture and link these and many more like them in an online **Infrastructure for Results.**

We already connect state government performance data to societal level benchmark data. But what we want to do now is extend that to partners outside of state government.

We want to launch a collaborative Web presence where partner networks across Oregon working on teen pregnancy, for example, can learn from and help one another.

We want policy makers to be able to learn from what citizens and local communities are already doing to move the needle on the benchmarks.

We want to amplify local success stories using an enhanced Web presence and the media, linking them to the Oregon Benchmarks and the goals of Oregon Shines.

All three case studies link to the rural employment benchmark.



Benchmark #1 –
Employment in
Rural Oregon

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We know from just these few case studies that local community strategies impact Oregon Benchmarks.

For example, all three of the case studies contribute to Oregon Benchmark #1, Employment in Rural Oregon. They are on the ground in coordinated action to advance Oregon's well-being in this area.

Seven state agencies link to rural employment, too.

- ✓ Assisting capital projects (OECDD)
- ✓ Getting job seekers jobs (OED)
- ✓ Generating personal income from wildlife watching, hunting and fishing (ODFW)
- ✓ Increasing training agents rural areas (DOLI)
- ✓ Speeding up liquor licenses (LCC)
- ✓ Providing construction jobs (ODOT)
- ✓ Making industrial sites “project ready” (ERT)

http://www.oregon.gov/DAS/OPB/obm_partners/links01.shtml

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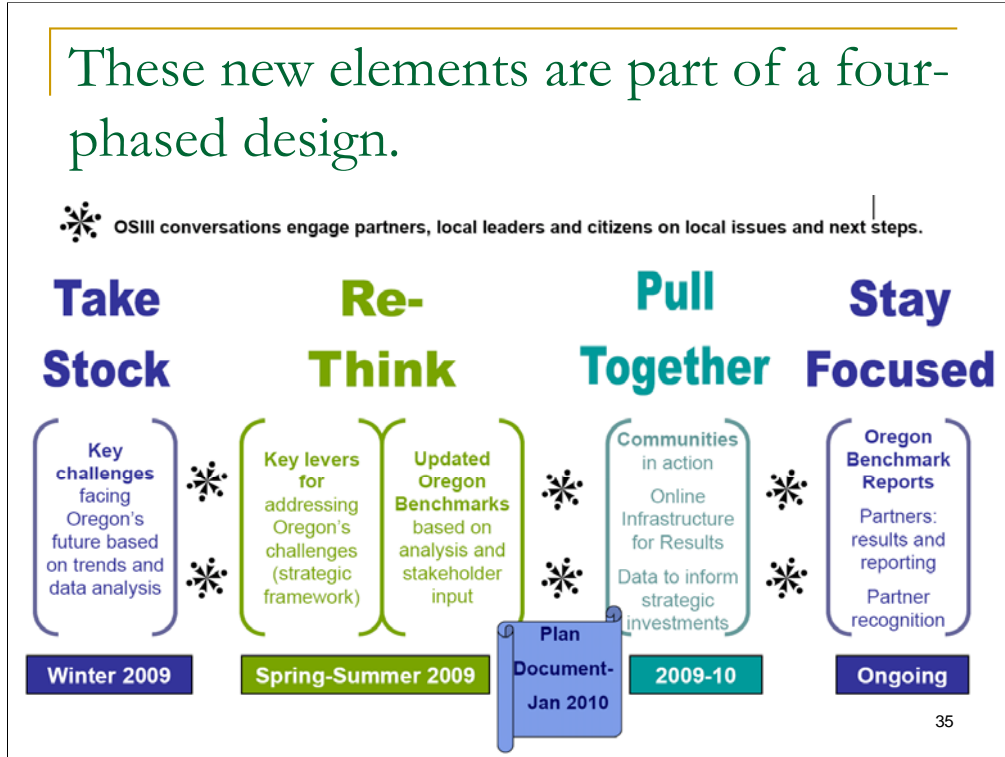
Seven state agencies link to the same benchmark. Here are their strategies.

The check marks mean that the performance measure hit its target in their last annual performance progress report. It looks like all of them met target but one.

It seems to me that there could be increased awareness and coordination between the benchmark-related accomplishments that **communities** are already making and the **government programs** that are supposed to be helping them. I wonder, for example, why our state agency on Community Colleges and Workforce Development does not link to this benchmark.

One of my favorite questions of state government is, “Does it all add up?” Do the outcomes we offer back to taxpayers add up to what government should be doing to most effectively help communities advance their economic, social and environmental well-being?

I believe that the online Infrastructure for Results will provide information that spurs conversations around these issues.



Systems dynamic modeling and amplifying local accomplishments are part of a four-phased design for Oregon Shines III.

The first two phases are the “planning” part – **taking stock** of and **re-thinking** our analysis, strategies and updated benchmarks.

The last two phases are about long term action – pulling partners together across Oregon, listening and learning from each other to make their future better.

Without **pulling together** and **staying focused**, I believe that our benchmark results in another 20 years will be more of the same – mixed.

Tied together with eight work streams

Oregon Shines III Work Streams				
Workstream:	Take Stock	Re-Think	Pull Together	Stay Focused
1. Public engagement	<i>Attend existing regional and association meetings to listen, build understanding, and put benchmarks into local context</i>			
2. Analyze trends and other factors	<i>Identify key challenges facing Oregon's future</i>			
3. Update the benchmarks and produce the plan	<i>Identify key levers, update the benchmarks and create a compelling OSIII story (plan)</i>			
4. Oregon Shines III Conversations	<i>Six, rotating around the state</i>	<i>to dialogue about learning,</i>	<i>seeking input and</i>	<i>engagement for next steps</i>
5. Study, amplify local innovations	<i>Identify, study and understand local community and government innovations; promote via public media, web presence</i>			
6. Dynamic OSIII Web presence	<i>Customize enhanced, online "Infrastructure for Results" to the needs of community, program, legislative and government users</i>			
7. Evaluation & continuous improvement	<i>Evaluate OSIII success against project goals</i>			
8. Project Management	<i>Oversight, planning and coordination, communication & public relations, performance reporting</i>			

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The four phases are tied together with eight work streams, which include the traditional analysis and benchmark updates as well as public conversations across Oregon, studying and amplifying local successes and the new and enhanced Web presence.

This design forms the basis for the business plan that we are just now finishing for the project.



So now the heat is on. You may or may not know that the Progress Board has a staff of two people. The Oregon Shines III design is audaciously robust with a hefty price tag, at least by Oregon standards.

We will need to fundraise like never before and create a true and lasting partnership between governments, business and foundations in Oregon.

We also know that Oregon foundations and state legislators are looking at a tough economy in the next budget cycle, so we will need to shake the trees of national foundations that have an interest in embedding systems methods in new and interesting ways.

So please send positive energy and stay tuned!

Thank you!



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Thank you again for allowing me to present to you today from the other side of the world.