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**REPORT
ON
THE IMPACT OF CITY CLUB REPORTS**

To the Board of Governors,
The City Club of Portland:

I. INTRODUCTION

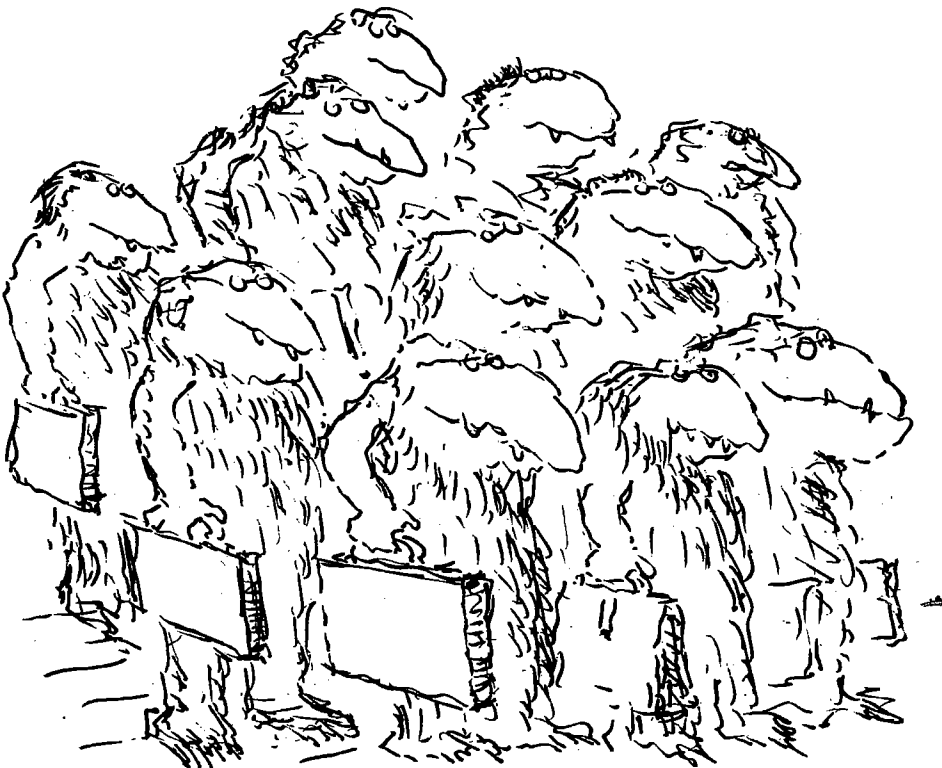
Problem to be studied:

Our Committee was appointed in 1973 and was charged:

“to review and report on all City Club reports (*excluding ballot measures*) published within the last five years to:

- a. evaluate effectiveness,
- b. make recommendations for future City Club research reports and procedures suggested toward greater effectiveness.”

In the material which follows, we have put together an “in-house” report, somewhat more informal than usual, in which we have taken a respectful but concerned look at the City Club’s ‘sacred cow’—the research report. Through a critical examination of a fair sampling of reports, we formulated certain criteria for determining their effectiveness.



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After classifying the reports according to these criteria we analyzed the reports to determine why some were more effective than others. From this analysis we distilled a set of characteristics which appeared likely to result in an effective report. Our final step was to use our analysis as the basis for specific recommendations which might improve the effectiveness of future reports.

II. BACKGROUND

Repeatedly, in the printed matter issued by the Club, the importance of the work of research committees is emphasized:

"CHIEF FUNCTION of the City Club is to study and report on matters of civic concern."¹

"Undoubtedly the foremost service rendered by the City Club is embodied in the organized committee studies of important problems and issues arising in Portland and Oregon."²

"IT GETS RESULTS."³

"Some City Club reports have attracted nation-wide interest. Many copies have been bought for use by educational and research organizations. Others have been responsible for surveys by government bodies and some have resulted in specific legislation."⁴

". . . Portland's City Club is recognized as one of the most outstanding research groups and guardians of the public trust in the nation, with any number of its reports receiving national recognition."⁵

We are reminded that "The City Club of Portland was organized in 1915 by a group interested in the study of social and economic problems of the community."⁶

The traditional position of the Club has been to accept uncritically the assumption that the thoroughness and objectivity of its reports was enough to assure their value to the community.

"The principal justification of the Club's existence and potential usefulness to the community rests in public recognition of the Club's unquestioned integrity of thought and action marked by the absence of all avoidable bias."⁷

Until 1966 the City Club seemed satisfied with its role as an organization devoted to the objective study of community problems, and gave little consideration to taking affirmative action to implement the recommendations of a committee. As pointed out in a 1963 report of the *Committee on Expanded Coverage of the City Club*:

"The Club sees itself as an impartial research organization. It has been content to obtain moderate community coverage of the results of its committee investigations through publication of the committee recommendations and has intentionally and deliberately refrained from attempts to secure affirmative community action on those recommendations . . ."

The 50th Anniversary of the Club in 1966-67 prompted the Board of Governors to form a *Club Action Committee* to examine this traditional position and consider whether it should be modified to permit the Club to take action to effectuate the approved recommendations of a research committee. The Action Committee in its report concluded that the Club should not be converted into an "action group," that is, a group "seeking, by direct political action, to secure acceptance of programs for civic betterment." How-

¹Description of City Club function on membership application form.

²"The City Club, What it is" p. 3

³Ibid. p. 4

⁴Ibid. p. 5

⁵"The Conscience of a City," 1966. p. 50

⁶"The City Club, What it is" p. 3

⁷Ibid. p. 3

ever, the Action Committee also concluded that "the impact on the community of many research reports of City Club committees can be increased by various types of limited action and by additional efforts to publicize the reports and recommendations."

The Action Committee recommended more intensive efforts to publicize results of the Club's work, and the design of procedures under which City Club representatives would appear before governmental bodies to urge action on the approved recommendations contained in a City Club report. In addition, it recommended that standing committees should be created "to observe and report on particular agencies of local government and agencies handling matters of continuing local concern."

Since November 1969, when the report of the Action Committee was approved by the Club, very little has been done to implement the Committee's recommendations. But concern about the effectiveness of research reports has continued—and justifiably so. Hundreds of hours of volunteer effort by Club members and a substantial part of the Club's funds were devoted to research activities. Yet numerous committee members and chairmen who worked on reports during the past five years expressed disappointment and frustration at what they perceived as the ineffectiveness of their reports.

It is appropriate to note here that some members of the present Review of Reports Committee brought to their task a preconception that most City Club research reports were ineffective. As will become apparent in the subsequent discussion, they were pleasantly surprised to find that, overall, the reports have been more effective than they originally believed. The discussion also makes clear that the effectiveness of reports can be substantially improved.

III. EVALUATION OF EFFECTIVENESS OF REPORTS

Our committee reviewed the seventeen research reports published in the 1968-72 period* to ascertain to what extent a report had influenced action in the community or state. Work sheets were prepared tabulating the 112 recommendations contained in the reports. Interviews were arranged with chairmen and members of the research committees, and questions were asked of legislators, government officials and others concerned with decision-making in the relevant subject-matter areas.

*An evaluation of each of these seventeen reports is a part of the City Club files relating to the work of this committee. The reports were generally thorough, well documented and rational in their conclusions and recommendations. They represented creditable research studies which had the potential to be of substantial value to the community.

The Problem of Evaluation

At the outset of our evaluation, we were principally interested in whether a report caused or strongly influenced community action. The supplemental report on *Emergency Care to Injured and Stricken in the Portland Area* (1970) is illustrative. As an outcome of this report and its 1966 predecessor, new planning for emergency care was undertaken, service in most hospitals was raised to excellent levels, and the entire ambulance system was reorganized.

But when we reviewed numerous other reports we soon found that prompt implementation is not the sole gauge of a report's influences. For example, if the effectiveness of the report on *Property Tax Exemptions* (1969), is judged simply by determining whether the report's recommendations were carried out, this report would be called ineffective, since its recommendations were not implemented. On the other hand, considerable attention was paid to the report by legislative committees, and it did communicate clearly and strongly what the City Club membership thought about the issue at that time. It was "effective" in accomplishing at least these two results.

Then, too, implementation of a report's recommendations may be long delayed. The influence of the report on *Law Enforcement in the City of Portland* (1968) was "disappointing" to the research study committee which prepared it; for years it was thought to have had no impact. But in preparation for an interview with our Committee, the Law

Enforcement Committee Chairman learned that many of the current policies and procedures at the Police Department are directly traceable to his Committee's report.

Some of the reports were concerned with broad, generalized subject matter: *Racial Justice in Portland* (1968) is an example. To those who expect a report to result in perceptible action, this report appeared ineffective, or worse; in the words of the Committee's chairman, the report was "a time-wasting exercise in futility." But reflection suggests that such reports may have importance for their educational and historical values, and they can be called effective even if they do no more than inform City Club members and communicate City Club opinion about serious, urgent issues.

Criteria for Evaluating Effectiveness

On the basis of its examination of the seventeen assigned reports, the Committee ultimately formulated three principal criteria for effectiveness, as follows:

1. A report may be said to have been fully effective if its recommendations were adopted, or action was stimulated along the lines of the report's recommendations.
2. Even if a report's recommendations were not adopted, it may be said to have been made moderately effective if it reached and was seriously considered by the relevant decision makers.
3. If a report's recommendations were not adopted, or were of such a generalized character that they could not soon lead to visible action, the report may have been effective in providing broader understanding of a problem by City Club members and other community leaders, and it would have value as an historical record. (The Committee recognizes that every well prepared report has some degree of effectiveness under this test.)

Application of Criteria to Reports of Past Five Years

What follows is the Committee's evaluation of the seventeen reports according to the above criteria. The charge to each reporting committee is summarized and the report is commented upon briefly.

1. *In the Committee's opinion, nine of the reports were fully effective within the test of Criterion 1. These were the following:*

Law Enforcement in Portland (1968)

To study "the organization, policies and practices of the Portland Police Department"; and "the possible utility in Portland of a Citizen Review or Advisory Board."

This report was believed to be ineffectual until Chairman Caughlan recently interviewed key City officials and Police Department administrators. Many of the report's recommendations are now in effect and the report is still in use. Since 1969 the police union has used it as a guide in collective bargaining. It has been used extensively by former Police Chief McNamara and present Chief Baker, by the Mayor's office and by police in the service training program; it is also used in Law Enforcement classes at Portland State University and Mt. Hood Community College.

Journal Building Site Use, Riverfront Development (1969)

To study "planning for the best use of the old Journal Building site," plus "planning activities relating to the development of the riverfront."

This report was timely, brief, illustrated and interestingly written by a vigorous committee. It was intelligently followed up. In the opinion of Mayor Neil Goldschmidt it was effective in 1) encouraging the closing of Harbor Drive, 2) influencing the initiation of a riverfront study, and 3) clarifying the issues involved.

Supplemental Emergency Care to Injured and Stricken (1970)

To study "the extent to which the previous committee's recommendations have been implemented."

This report is clearly one of the City Club's most effective efforts. The Committee had limited, specific objectives, which it examined critically but constructively. Our review

indicated that the influence of the report resulted in new planning for emergency care, improved care in most hospitals, and reorganization of the entire ambulance system.

Portland Municipal Zoo (1970)

To study, "Organizational structure, policies, administration, facilities, financing and goals of the Portland Zoo."

In his 1974 address before the City Club Dr. Philip Ogilvie, Director of the Portland Zoo, stressed the direct relationship of the report's recommendations to the subsequent reorganization of Zoo management and changes in animal exhibition policy.

Sign Code Revision (1971)

To study "the Sign Code and recommend revisions thereto which would consider the relationship of identification and advertising signs to our buildings, streets and public spaces, for the purpose of enriching the appearance of our City and reducing traffic hazards."

This report was concerned with immediate, tangible community problems. Its recommendations were specific and practical. Recent inquiries by our Committee established that the report is being used in on-going Portland sign code revisions, and in revision efforts in Eugene and Seattle.

Services for Severely Disturbed Children (1971)

To study "what facilities are available for psychiatric assistance to severely disturbed children, and what progress is being made to increase the availability of such programs."

This has been one of the most sought-after of all City Club reports. Its use by the medical profession has been very broad, and it has stimulated programs of the League of Women Voters and the Mental Health Association of Oregon. Specific progress in the care of disturbed children is traceable to the report's recommendations.

Non-Commercial Television (1971)

To "examine and report on non-commercial TV in Oregon . . . how non-commercial TV can realize more of its potential for meeting the needs of the community."

This report and Salem appearances of a committee member influenced the enactment of the statute creating the Oregon Education and Public Broadcasting System. Some provisions of the statute follow City Club recommendations almost verbatim.

Urban Renewal in Portland (1971)

To study "the history, structure and programs of PDC (Portland Development Commission); relationship of programs to community objectives, to low and middle-income housing, and to community participation; advantages and disadvantages of autonomous agency."

This was a thorough but controversial report, criticized by some as less objective than most City Club reports, and clearly action-oriented. Soon after publication some of the report's recommendations were put into effect, and its influence upon the personnel and later procedures of the PDC has been evident.

Legal Sanctions of Marijuana (1972)

To study "the legal sanctions imposed upon the possession, use and sale of marijuana in Oregon" and "the appropriateness of these sanctions."

Although all of this report's recommendations were not adopted, the 1973 Legislature did reduce the penalty for possession, which was in accordance with the basic viewpoint of the report. The report apparently had an effect upon the community, judging from the publicity it attracted, the large number of copies requested, and questions asked at meetings the chairman attended. The ACLU used the report in appearing before the Legislature in support of the report's recommendations.

2. The Committee found that the following three reports were moderately effective within the test of Criterion 2:

Property Tax Exemptions (1969)

To "consider the validity of the public policy reasons for continuing the exemptions from property taxes of literary, charitable, scientific, fraternal and religious organizations." The House Committee on Taxation carefully considered this report, with the City Club committee chairman appearing twice as an expert witness. However, no new legislation on this subject was adopted.

Motor Vehicle Safety (1971)

To "study and recommend practical and worthwhile improvements in law and regulations, other than traffic regulations which would promote safe operation of motor vehicles." The Committee submitted some 37 specific recommendations covering six areas of motor vehicle safety. The report was in preparation during three legislative sessions, and it was used in a presentation at the legislature by at least one City Club member upon completion. Ten of the recommendations have been at least partly implemented and the report appears to have been influential in accomplishing this. Many of the recommendations are still timely.

Bail and Other Pre-Trial Release Procedures (1968)

To "study and report on release procedures affecting accused persons before the courts of Oregon."

Legislation incorporating many of the report's recommendations was passed in 1973, but this excellent report had no direct influence because the legislative committees were not made aware of it. There are indications that the report was instrumental in stimulating interest in the release problem in 1967 and 1968 and in creating a viewpoint which aided enactment of the 1973 legislation.

3. The following five reports contributed to broader understanding of the assigned problems by City Club members and other community leaders within the test of Criterion 3:

Ombudsman (1970)

To study "the feasibility and desirability of implementing the Ombudsman concept." This lengthy report showed thorough research, with excellent documentation, and focused attention on the need to bridge the gap between the government and the governed. However, its recommendations were very general, and apparently had little effect even in preserving the Governor's pilot ombudsman program, which did not secure legislative support.

Planning for Transportation in Portland (1968)

To study "the preferred pattern of future transportation planning efforts," with focus on "problems of governmental organizations for planning."

The Committee recommended a strengthening of CRAG to make it a permanent, area-wide organization with a stable financial base and greater authority in the formulation of comprehensive plans. The report was cited several times in subsequent efforts by individuals and groups who worked toward legislation that ultimately resulted in such strengthening by the 1973 Legislature. The report has also been used extensively by Portland State University classes concerned with planning problems in the metropolitan area.

Portland Mass Transit (1969) Interim Report

To study "the process now under way by which the City of Portland will take over the operations of RCTCo."

This interim report presented a history and review of Rose City's long struggle to operate a mass transit system on a for-profit basis. The report made no firm recommendation for specific legislation. The legislation "favored" by the research committee differed from the enactment which resulted in the creation of Tri-Met.

Racial Justice (1968)

To "respond in terms of the Portland community" to the Kerner Report. Produced during a highly charged period of racial tensions and potential violence, this thoughtful and comprehensive report helped to focus public attention on the existence in Portland of many facets of the national problem. The recommendations were broad and general; a recent review of the situation indicates minimal real improvement; the report seems to have had little direct influence.

Model Schools (1972)

To study "the objectives and content of the Model Schools program . . . and the actual operation of the affected schools."

This was another thoughtful and constructive report, whose value lay in its insights into the operation of the model schools program. According to the committee chairman the recommendations of this report were less effective, possibly because of unfortunate timing and the inability of the School District to supply statistical data to make a strong case for the value of a model schools program.

IV. OBSERVATIONS AS TO EFFECTIVENESS: WHY WERE SOME REPORTS MORE EFFECTIVE THAN OTHERS?

The foregoing summaries of the seventeen reports support several generalizations as to why some of them were more effective and others were less so.

A starting point is that **the most effective reports dealt with problems that were limited, specific and tangible**, so that it was possible for the committee members to examine them "on the ground," and to recommend practical measures for dealing with them. Examples are the reports on the *Journal Building Site*, *Supplementary Report on Emergency Care*, and *Sign Code Revision*. In contrast, the broad subjects assigned for the reports on *Planning for Transportation* and *Racial Justice* made effective implementation of these reports doubtful and difficult from the start.

A second point that stands out is **the value of a well-designed charge to the committee**. The charge given the committee on *Law Enforcement* might well serve as a model in its careful and clear specification of the areas to be investigated.

Third, it is clear that **timeliness can contribute materially to a report's effectiveness**. Examples are the report on the *Journal Building Site*, and the *Supplementary Report on Emergency Care*. In contrast, the report on *Property Tax Exemptions* was undertaken at a time when there was no movement for tax reform in this area; similarly, the *Model Schools* report came out when the School District was not ready to review its program in this area.

Fourth, **the effectiveness of a report is obviously enhanced if its recommendations are stated in practical terms**, that is, if the recommendations are realistic and feasible of accomplishment. Noteworthy as examples are the recommendations of the reports on *Law Enforcement*, *Supplementary Emergency Care*, and *Sign Code Revision*.

Fifth, it is clear that **close and careful follow-up will frequently give a report greater effectiveness**. Thus the report on the *Journal Building Site Use* was more effective because it was intelligently followed up; and in the case of the report on *Non-Commercial Television*, a committee member is credited with doing effective lobbying in Salem in support of the Committee's recommendations. In contrast, the lack of vigorous follow up activities limited the effectiveness of the report on *Bail and Other Pre-Trial Release Procedures*.

Finally, **a City Club study may be effective even before a report is issued**. Knowledge that the study is under way, the committee's inquiries in the course of obtaining informa-

tion, and questions put to officials and administrators who were interviewed by the committee, all have what one administrator described as a "squirm effect." The result may be self-examination and corrective action by the responsible parties in advance of issuance of the City Club report.

V. METHODS OF INCREASING EFFECTIVENESS OF REPORTS

1. Selection of Research Subjects

(a) A major finding of our Committee is that research reports dealing with specific and manageable subjects are more likely to result in action. This result is predictable. Administrators and government officials are more appreciative of thoughtful, practical recommendations for solving a problem than they are of essays on political theory or philosophical values. In fact, it appears that most City Club reports are concerned with specific and more or less well-defined problems. A few, such as *Planning for Transportation* and *Racial Justice*, would have been more effective if they had been more limited in scope.

(b) The Committee believes that in general the City Club should focus its research upon Portland metropolitan community problems and institutions, and resist temptations to wrestle with regional and state issues of broader scope. We recognize the importance of these broader issues but we are convinced that lay researchers find concrete community problems more manageable, and that reports on such subjects are more likely to result in action (examples: *Supplementary Emergency Care vs. Ombudsman*).

(c) Our study of the reports indicates that they were most effective when committees recognized the reality they were dealing with and tried, early in their study, to evaluate the practical effect of their conclusions and recommendations. When writing their recommendations they knew what they were prescribing and were explicit about it. (Examples: *Journal Building Site, Sign Code Revision*, etc.)

(d) In selecting topics and in writing the charge to the Committee, the Project Planning Board should consider the potential for action which could result from a report. Where appropriate, the Board should refer to its concern about implementation in its charge to the committee. Similarly, the study committee and the research advisor should give careful attention to the problems of implementation.

It is assumed that the City Club will continue to publish some broad, philosophical reports (*Goals for Portland*) even though it is not realistic to expect implementation of such reports soon after publication of the study. But for those reports which are limited to a definite, concrete, often urgent problem (*Noise Controls in the Portland Metropolitan Area*) we believe that the charge should require consideration of the problems of implementation.

(e) Politically sensitive community problems involve special considerations affecting the selection of the committee, the writing of the report, and the initiation of action to implement approved recommendations. All of these problems should be carefully weighed in assigning such a problem as the subject of a Club study. In planning and conducting such a study, the Research Board and Project Planning Board must be alert to the risk of having to appoint committee members who are advocates of a controversial viewpoint, and they must therefore be careful to insist that conclusions are adequately supported and objectively stated. They must also recognize that if the recommendations in such a report are approved by a close vote, even limited Club action to implement the recommendations will be difficult.

Among the seventeen reports examined by this Committee, the *Urban Renewal* report had politically sensitive aspects. Critics of this report feel that it was not handled with the special care and attention suggested above.

2. Timeliness

Timeliness is a factor at two points in the life of a research study: (i) when the study is authorized and (ii) when the report is issued. Timeliness of authorization is a con-

sideration to be weighed in the selection of research subjects, that is, a report is more likely to be effective if there is a high current level of interest or controversy regarding the subject. The *Journal Building Site* report is a prime example of a study of an issue which was of intense current interest and required an immediate response. The Highway Department had announced plans to construct an eight-lane highway through the area; authorization of the study and investigation by the committee were carried on at top speed in a period marked by activity of citizen groups and frequent newspaper commentary.

In a somewhat different context, authorization of the *Supplemental Report on Emergency Care* was also timely. The study appears to have been initiated in response to a general feeling among doctors and hospitals that the time had come to see that reforms in emergency care procedures were put into effect.

It is clear that the likelihood that a report will be effective is substantially enhanced if it is authorized in response to an existing ferment in the community or to current proposals for legislative action. These are not, however, exclusive conditions precedent to the initiation of a City Club study. The publicity given to the authorization of a Club study and the awareness of public officials that an investigation is under way may be a valuable energizer of community interest.

Our review of reports also indicates a definite relationship between the timeliness of issuance of a report and its effectiveness. If a report appears after some definitive action has been taken, i.e. a highway has been built on the Journal Building Site, or after public interest in the issue has subsided, the recommendations of the study committee are not likely to be implemented.

Enormous amounts of time are spent on City Club reports: five to six years on the *Sign Code Revision* and the *Motor Vehicle Safety* reports, and an average of two to three years on most others. In the case of one report (*Sign Code*), the chairman died during the course of the study; in others, delays were caused by a few members dropping out of a committee, necessitating new appointments. The Club should examine the research process to determine if the length of time required to complete a report can be reduced.

Most research committees relax during the summer. In order to speed up the report, it is suggested that whenever possible the process of committee membership selection, orientation and outlining the study, should be completed by September; a target for drafting the report should be set for the following June; and the final report should be published in October or November.

3. Organization and Style

It is obvious that a report will be effective only if it attracts readers and makes its points clearly and persuasively. Thus the effectiveness of a report will be enhanced by logical, orderly development of the Committee's ideas, use of topic and subtopic headings, relatively short paragraphs, brevity of expression, and judicious use of appendices for supporting detail—in short the recognized attributes of effective expository writing. If the Club can afford the cost, it would be desirable to include more illustrations in reports, and, ideally, to have the entire layout designed by a professional graphic designer.

4. Statement of Charge to Study Committees

As the City Club Research Manual points out: "the most important step in organizing a research project is *the definition of the problem.*" At present, the Project Planning Board submits to the Board of Governors the topic to be studied and the wording of the specific committee assignment. Upon approval by the Governors this becomes the directive to the committee, setting forth the subject, the general scope, and the limits of its study.

After reviewing the seventeen reports included in this study, the Committee found that in the nine reports which met Criterion 1 of effectiveness (i.e., recommendations were adopted, or action was stimulated), the charges to the research committees were unusually clear and the areas to be investigated were limited and specific. Clear charges describing specific areas to be studied appear to increase the likelihood of an effective

report; charges which outline wide-scope subjects in general terms appear to result in non-specific, theoretical conclusions.

The point is illustrated by a comparison of the charge and the conclusions of the *Journal Building Site Use* report with those in the *Racial Justice* report. The charge to the Journal Building committee read as follows: "Study the planning activities relating to the development of the riverfront from Ross Island Bridge to the Steel Bridge, between the river and Front Avenue." The study was to include but not be limited to:

1. Reviewing all relevant plans currently being considered;
2. Identifying the functions to be served by the riverfront development, and
3. Developing criteria to be used in planning.

The Committee studying *Problems of Racial Justice in Portland* was given a large order: to "... respond in terms of the Portland community to the report of the National Advisory Commission on Civil Disorders." Matters to be considered included employment, education, public welfare, housing, police, justice under emergency conditions, discrimination in private organization, etc. The chairman of the Racial Justice Committee, Richard W. Nahstoll, now believes that the assignment was too general; that the report might have been more effective if it had concentrated upon an investigation of racial discrimination in employment, or immediate and practical solutions of black housing problems.

It is evident that the Project Planning Board and Board of Governors should continue to exercise great care in formulating charges to research committees. As noted in the earlier section on selection of research subjects, the assignment should take into consideration the potential for implementation. In addition, the charge should be so drafted that the Committee will be encouraged to arrive at conclusions and make recommendations whose implementation may reasonably be expected.

VI. ACTION TO IMPLEMENT RECOMMENDATIONS

Follow-up Procedures

The City Club does not have a formal, planned follow-up procedure to determine when and how a research report's recommendations may be relevant to community decision-making. The absence of such a procedure made it difficult for the Committee to find out whether the reports which it examined had been implemented.

In nine of the reports reviewed by the Committee there was no indication of a follow-up by the research committee or by other City Club members. In the other eight reports, some degree of follow-up occurred, largely accidental and unplanned.

Based on their experience, some research chairmen strongly favored the appearance of members of their committees before the legislature, City Council, or other agency considering the subject matter of a research study. Several chairmen recommended that a committee member or chairman be given the responsibility of monitoring *systematically* the response to his committee's research report during a specified period after its approval by the Club. It was suggested that the designated member should be asked to note relevant developments and report them to the Research Board. The developments might be (i) evidence of implementation of the Committee's recommendations; (ii) additional evidence either in support of or contradictory of the recommendations; (iii) information regarding new conditions calling for study by the City Club; and (iv) information that a community decision is imminent on the subject of the report.

Suggested Specific Procedures for Follow-up and Monitoring

(a) At some point during the latter stages of report preparation, each committee should devote a meeting to a strategy of implementation. This strategy should not be included in the report, but should be outlined and ready for use if the report is approved by a substantial majority of those voting when the report is presented to the Club. If the report is so approved, the Committee should meet again to designate members who will be responsible for the follow-up.

(b) The follow-up procedure could include the following activities:

1. Distribution of the report should be supervised by committee members to make sure that it is sent to appropriate responsible officials. Care should be taken to see that the letter of transmittal will inspire the recipient to read the report.
2. After a reasonable time has elapsed from the time the report was distributed, a letter should be sent to the responsible officials, asking for reactions to the report.
3. If no answer is received to the request in No. 2 above, within a brief additional period, a committee member should call upon the official to learn (i) when the official intends to bring the matter before the appropriate council or board, and (ii) the official's attitude toward the Club's recommendations.

(c) In the case of some reports, it may be appropriate to designate the committee chairman or another member as an expert witness ready to appear before decision-making bodies. If such an appearance is approved by the Board of Governors, it should be authorized to be made in the name of the City Club.

(d) A designated committee member should undertake to keep in touch with community developments in the area of the Committee's research for a period of perhaps three years, and to notify the Club's office of any impending hearings or other proceedings at which the Club's position should be presented, and of any new facts warranting further study by a committee of the Club.

VII. METHODS OF OBTAINING WIDER PUBLIC AWARENESS OF CITY CLUB REPORTS

It is evident that to the extent a community is unaware of the contents of a City Club report it will not be affected by the study committee's efforts. In view of this self-evident truth the City Club's failure to devote time and effort to publicizing its reports in the community is strangely at variance with the major effort which the Club makes to produce objective, well-researched studies on important community issues.

The report of the *City Club Action Committee* in 1968 recommended the following methods of publicizing the results of the Club's work:

"(2) The Board of Governors in its discretion should specifically urge Club representatives or, where the request comes to the Club, should should authorize Club representatives to appear on radio and television programs in panel discussions or interviews, and as speakers before community groups. To insure the availability of such speakers and to publicize their availability, it would be desirable to appoint a panel of speakers on a particular subject and to have the Club seek opportunities for members of the panel to appear.

(3) It would be worthwhile to write organizations of all kinds—service clubs, Parent-Teacher Associations, study groups, social clubs, church and fraternal societies—to inform them of the readiness of Club representatives to speak on various topics. In some instances it may be profitable to furnish the organization with copies of research reports, either on a continuing basis, or on request in particular instances. Inquiries should be sent to political science teachers in Oregon high schools and colleges—particularly in the Portland metropolitan area—to find out whether they can make use of selected reports.

(4) The possibility of using TV Channel 10 for the presentation of committee reports and panel discussions should be explored."

This Committee believes that the Board of Governors should promptly review these recommendations and take appropriate steps to implement them.

VIII. CONCLUSIONS AND RECOMMENDATIONS

The Committee has arrived at the following conclusions and recommendations:

1. Although City Club reports have been more effective than some Committee members believed at the outset of this study, the effectiveness of reports can be substantially improved.

2. The effectiveness of reports can be increased by such methods as the following:

- (a) In selecting research subjects the Project Planning Board should give priority to those which (i) deal with specific, well-defined problems, rather than broad philosophical issues, (ii) are concerned with issues and institutions of the Portland metropolitan community, and (iii) are likely to result in recommendations for action which can be implemented.
- (b) Since timeliness is often an important element in making a report effective, the Project Planning Board, the Research Board and the study committee should be alert to obtain the benefits of timely authorization and issuance of a study.
- (c) The statement of charge to the study committee should set forth clearly and specifically the areas to be investigated and should encourage the Committee to make recommendations which are capable of implementation.
- (d) The Club should institute systematic follow-up and monitoring procedures, including inquiries of responsible officials and appearances by Committee members before decision-making bodies.
- (e) Procedures should be instituted to obtain greater publicity for City Club reports.

Respectfully submitted,

Walter G. Brown
John L. Butler, M.D.
Allan Hart
Adam J. Heineman
Millard H. McClung
Dr. Thomas Poulsen
Thomas B. Stoel
Walter Gordon, *Chairman*

APPENDIX A

The reports reviewed by our Committee are listed in chronological order. Descriptive material and detailed results of investigations for effectiveness by sub-committees are on file in the City Club office:

1968

Bail and Other Pre-Trial Release Procedures. April 5, 1968, Vol. 48, No. 45.

Problems of Racial Justice in Portland. June 14, 1968, Vol. 49, No. 2.

Law Enforcement in the City of Portland. August 30, 1968, Vol. 49, No. 13.

Planning for Transportation in the Portland Metropolitan Area. December 6, 1968, Vol. 49, No. 27.

1969

Interim Report on Portland Mass Transit and the 1969 Oregon Legislative Assembly. May 2, 1969, Vol. 49, No. 48.

Interim Report on Journal Building Site Use and Riverfront Development. August 8, 1969, Vol. 50, No. 10.

Report on Property Tax Exemptions. August 15, 1969, Vol. 50, No. 11.

1970

The Ombudsman (or Public Protector) Concept, and Grievance Handling and Citizens' Services in Oregon. May 29, 1970, Vol. 50, No. 52.

Supplemental Report on Emergency Care to the Injured and Stricken in the Portland Area. July 31, 1970, Vol. 51, No. 9.

Portland Municipal Zoo. August 7, 1970, Vol. 51, No. 10.

1971

Sign Code Revision. January 1, 1971, Vol. 51, No. 31.

Services for Severely Disturbed Children in Oregon. March 19, 1971, Vol. 51, No. 42.

Non-Commercial Television in Oregon. April 16, 1971, Vol. 51, No. 46.

Motor Vehicle Safety. May 14, 1971, Vol. 51, No. 50.

Urban Renewal in Portland. August 13, 1971, Vol. 52, No. 12.

1972

Legal Sanctions of Marijuana. April 14, 1972, Vol. 52, No. 48.

The Model Schools Program of School District No. 1. June 9, 1972, Vol. 53, No. 2.

APPENDIX B**PERSONS INTERVIEWED OR CONSULTED BY THE COMMITTEE:**

Philip Abraham, Judge, Municipal Court, City of Portland
Stanton Allison, Research Editor, City Club of Portland
Bruce R. Baker, Chief, Portland Police Bureau, City of Portland
Anthony Barker, Model Schools Committee, City Club of Portland
Dr. Robert W. Blanchard, Superintendent, District No. 1, Portland Public Schools
Arnold Bodtke, Chairman, Planning for Transportation Committee, City Club of Portland
Dr. Allen Boyden, Emergency Care Committee, City Club of Portland
Senator John Burns, Oregon Legislative Assembly
James C. Caughlan, Chairman, Law Enforcement Committee, City Club of Portland
Philip Chadsey, Marijuana Committee, City Club of Portland
Robert Conklin, Bail and Other Pre-Trial Release Procedures Committee, City Club of Portland
Robert Ditewig, Motor Vehicle Safety Committee, City Club of Portland
Neil Goldschmidt, Mayor, City of Portland
William Gregory, Chairman, Property Tax Exemptions Committee, City Club of Portland
Dr. Charles M. Grossman, Chairman, Marijuana Committee, City Club of Portland
Emerson Hoogstraat, Chairman, Motor Vehicle Safety Committee, City Club of Portland
Morris Isseks, Archivist, City Club of Portland, special consultant to the Committee
David J. Lewis, Chairman, Journal Building Site Use Committee, City Club of Portland
Roy Lieuallen, Chancellor, State System of Higher Education
George McMath, Architect, environmentalist
Richard Nahstoll, Chairman, Racial Justice, Ombudsman Committees, City Club of Portland
Ellamae Naylor, then Executive Secretary, City Club of Portland
Carl R. Neil, Chairman, Services for Disturbed Children Committee, City Club of Portland
A. Thomas Niebergall, Chairman, Urban Renewal Committee, City Club of Portland
Dr. Philip Ogilvie, Director, Portland Zoo
Alex Pierce, Architect, environmentalist
Ronald K. Ragan, Ombudsman Committee, City Club of Portland
William C. Scott, Jr., Urban Renewal Committee, City Club of Portland
Arden Shenker, Acting Chairman, Sign Code Committee, City Club of Portland
Roger Shiels, Journal Building Site Use Committee, City Club of Portland
Morton Spence, Journal Building Site Use Committee, City Club of Portland
Donald J. Sterling, Jr., then President, City Club of Portland
John F. Williams, Chairman, Model Schools Committee, City Club of Portland

JOINT REPORT OF THE RESEARCH BOARD AND THE PROJECT PLANNING BOARD REGARDING PLANNING AND RESEARCH

TO: THE MEMBERSHIP OF THE CITY CLUB OF PORTLAND:

I. INTRODUCTION AND BACKGROUND

This report is an outgrowth of a series of joint meetings of the Research Board and the Project Planning Board in an effort to improve the quality of City Club research projects.

It has been apparent for some time to members of both Boards that certain aspects of the present procedures for handling research projects leave something to be desired. Particularly evident is the fact that the planning of research projects is handled by one committee, the Project Planning Board, whereas the implementation of the projects is the responsibility of the Research Board.

An *ad hoc* committee composed of members of both Boards was appointed to study the matter and recommend proposed revisions. This report and the proposed changes in procedure which are recommended herein, constitute the unanimous recommendation of the Research Board and the Project Planning Board.

II. PROBLEM AREAS

A. Dual Responsibility

Articles II and III of the Bylaws of the City Club provide for two separate Boards, the Research Board and the Project Planning Board, to handle the research functions of the Club. The Research Board is presided over by the First Vice President and has responsibility for implementing research projects. The Project Planning Board is presided over by the Second Vice President and has responsibility for formulating research projects for the Research Board to undertake. The only official line of communication between the two Boards is through the Board of Governors; that is, the Project Planning Board initiates an idea and drafts a charge which is submitted to the Board of Governors which in turn refers it to the Research Board to be implemented.

In line with a general objective of streamlining the research activity, it would appear that time would be saved and member effort made more productive if the same Board that promulgated the charge to the committee also worked with the committee and its chairman in assuring compliance with the intent of the charge. To be effective, a research charge must deal with specific, well-defined problems and must result in conclusions and recommendations which are realistic and which can be implemented. In some cases, it becomes desirable to alter the charge during committee research to reflect a more specific approach to a given problem, and it is believed that the Research Board, acting within its own membership, can do this more expeditiously.

B. Lack of Timeliness, Flexibility and High Quality

With the passage of years the procedures for handling research projects have become stiff, mechanistic and time consuming. Too often the entire process results in wasted time, money and effort.

The period of time involved from the point at which a research project is initially formulated to its final completion and presentation is often so great that by the time the report is finished and presented to the Club, it may no longer be timely. In addition, members tend to lose interest in projects that are too long in completion resulting in committees ultimately being disbanded or in the production of poor quality reports.

For example, every research project must now go through the following steps *before* anything is done on the study itself:

- (1) The Project Planning Board develops an idea and studies the issue.
- (2) The Project Planning Board prepares a charge.
- (3) The charge is reviewed and approved by the Board of Governors.
- (4) The charge is referred to the Research Board.
- (5) The chairman of the Research Board assigns the project to a Research Board member for supervision.
- (6) The Research Board member prepares a chairman "ask list."
- (7) The chairman "ask list" is submitted to the Research Board for approval.
- (8) The chairman "ask list" is submitted to the Board of Governors for approval.
- (9) The Research Board advisor selects a committee chairman.
- (10) The committee chairman prepares a committee "ask list."
- (11) The committee "ask list" is submitted to the Research Board for approval.
- (12) The committee chairman selects his committee.

These 12 steps routinely take as long as three months to complete and often take longer!

Once the committee is formed, it may take from six months to five years to complete its research. The length of time depends primarily upon the effectiveness of the chairman and the interest level of the committee members. The complexity of the subject matter is ordinarily not the major factor.

Once the research is completed, another rigid and time consuming set of procedures takes over. These are:

- (13) The committee drafts a report.
- (14) The report is redrafted and finalized.
- (15) The draft report is submitted to and studied by the Research Board.
- (16) The committee meets with the Research Board.
- (17) Changes are made.
- (18) The report is submitted to and studied by the Board of Governors.
- (19) The committee meets with the Board of Governors.
- (20) Changes are made.
- (21) The report is printed and circulated to the membership.
- (22) The report is presented orally and acted upon by the membership.

The Research Board and the Project Planning Board believe that many of these 22 steps can be eliminated entirely or considerably shortened. Both boards believe that the Club's procedures can be adapted to improve the quality and timeliness of reports and to provide greater flexibility in the scope and presentation of research products through such methods as using both the oral and the written format.

C. Insufficient Participation by Club Members

It is the opinion of the Research Board and the Project Planning Board that the present structure of the City Club has tended to promote a degree of "inbreeding" in the leadership of the Club, and has centralized too great a share of the decision making and responsibility in the few members of the Research Board, the Project Planning Board and the Board of Governors.

The opportunity for participation on research committees often provides the main reason to the prospective Club member for joining the Club and continuing membership through many years.

It has been observed by some close to the research process that under the present system (excluding ballot measure research projects) there are insufficient opportunities for participation in long-range projects for the growing number of Club members who we may presume wish to participate. A recent report by a Club committee* which reviewed the effectiveness of Club research reports during the past five years indicated that during the period from 1968 to 1972 there were only 17 long-range research reports

*The Impact of City Club Reports, Vol. 55, No 51.

to review and these reports involved committee participation by only 125 Club members.**

It is therefore believed that an effort should be made to broaden the base of the Club's research activities and its leadership in the hope of providing the maximum opportunity for all members to involve themselves in the research activities and decision making processes of the City Club.

The Project Planning Board and Research Board believe that a number of their combined functions can and should be delegated to standing committees. In addition, the Board of Governors should be free to handle the policy making functions of the Club, and should be relieved of a number of its present routine functions in the supervision and handling of research projects and reports. This is particularly true in cases where those functions are merely duplicative of the work of the Research Board.

D. Ballot Measure Studies

A tradition has developed whereby all ballot measures are now studied and reported upon in writing, and acted upon by the Club. Some of these measures are merely house-keeping measures, are non-controversial, or are of little significance to Portland. Reports are expensive to produce and the time of Club members is valuable. We therefore believe that the tradition of full, formal studying and reporting upon all ballot measures should be reexamined.

E. Lack of Efficient and Effective Procedures

The Research Board and Project Planning Board believe that the problems described above have impaired the effectiveness of the City Club, both internally and in relation to the Portland metropolitan community.

It is believed that this problem can best be solved by implementing the changes in procedure described hereafter, some of which will, it is recognized, require amendments to the Constitution and Bylaws.

III. THE PLAN FOR REORGANIZING THE PLANNING AND RESEARCH FUNCTIONS

A. The present Research Board and Project Planning Board would be combined into one Board, to be known as the Research Board.

The First Vice President would continue to be the Chairman of the Research Board. The Second Vice President would assume the role of Vice Chairman and would automatically succeed to the position of First Vice President, each for a one-year term. The First Vice President would be responsible for overall supervision of the activity of ongoing research projects. The Second Vice President would be responsible for supervision of the planning function of the interest groups and integration into an overall research plan for the City Club.

A panel of ten members of the Research Board would be selected by the Board of Governors upon recommendation by the First Vice President in consultation with the Second Vice President. The First Vice President would appoint each approved panel member to be the representative of a specific interest group. (See Standing Committee discussion below.) Each member of the Research Board would be responsible for supervising those projects within his or her group interests (subject to a work balance maintained under supervision of the First Vice President).

B. Club research activities would be aligned into ten general areas of interest, with a Standing Committee appointed in each area.

It is our opinion that the opportunities for participation in Club research activities should be expanded so that all who wish to participate may do so. Also, we have noted

**It should be recorded that during this period of time the Club studied 66 ballot measures involving committee participation by 432 Club members.

below a need for providing a new report format to permit timely coverage of important specific issues and to permit orderly follow-up on previously researched matters. To accomplish these ends, we propose the establishment of ten Standing Committees in general areas of interest, as follows:

- a. Arts and recreation
- b. Business and labor
- c. Education
- d. Environment and energy
- e. Health, welfare and social services
- f. Land use and planning
- g. Law and public safety
- h. Public finance and taxation
- i. State and local government
- j. Transportation and communications

The Chairman of each Standing Committee would also be a member of the Research Board and would be selected for a term of one year, with re-selection for a second year and a third year at the discretion of the Board of Governors. The Standing Committee would consist of not less than five members, with exact size to be determined by the range of potential activity in each particular group. Committee members would be selected by the Research Board, upon recommendation of the Board member assigned to that interest group (Standing Committee Chairman) with staggered two-year terms and with no limitation as to the number of consecutive terms.

The Standing Committee, under the direction of the chairman, would meet at least once a month and would keep written minutes of its meetings, which would be available to all members. It would be the body with primary responsibility for seeking out and formulating ideas for research projects within the area of its group interests. All Club members would be encouraged to pass on to the relevant Standing Committee suggestions for research projects. Research ideas received from non-members would be referred to the Research Board for referral to the appropriate Standing Committee. When a research idea is presented to the Standing Committee, it would do the initial study on the idea, interview persons necessary to clarify the idea, and prepare the initial draft of the written charge. The Standing Committee would also decide whether to recommend a long-range written report or an oral report.

The Standing Committee in each area of interest would

- a) organize itself into sub-committees, as necessary, to follow up on reports written on particular matters within each area of interest and to study an idea and prepare a written charge,
- b) take a long-range look at all matters of significant community interest and set forth priorities and objectives for research activity,
- c) monitor continually legislative activity in its area of interest and make whatever timely reports are necessary to report this activity to the membership while still in process, and
- d) appoint members to attend meetings, maintain press clippings and engage in any other appropriate activity to keep abreast of current events which may lead to research projects.

C. Proposed research projects would be expanded in scope and variety by adoption of an oral report format in addition to the present written report format.

The long-range research report, using the format which is familiar to all Club members, has been the primary method by which the Club has fulfilled its stated function to "study and report on matters of civic concern" and has provided the most effective vehicle for communicating with the general public.

An oral report format should now be instituted to supplement the present written report format and would be encouraged for those projects carrying a more precise and

specific charge and those with a need for an immediate study. The study committee would be small and would be encouraged to take no more than 60 days to prepare the outline of its report. The report would not necessarily include any recommendations. The committee chairman would be assigned time at a Friday luncheon to present this report to the members (after approval of the outline by the Research Board). No formal vote as to approval or rejection would be taken at the Friday meeting. A summary of this report would be prepared by the committee chairman and included in the Bulletin to be published shortly thereafter, together with an account of Club response prepared by the staff.

The oral report format may also be suitable for follow-up reports on matters presented in previous long-range reports. These follow-up reports could include a) results of action taken on prior specific recommendations approved by the Club, b) recent developments which may cause an alteration in previously approved recommendations, or c) other significant matters which would be of interest to the Club membership. The effectiveness of City Club reports cannot be measured accurately in terms of Club interest and community reaction unless there is some systematic follow-up procedure; an oral report format may provide the key.

The written report format would, of course, be retained and would continue to provide the heart of the Club research activity. Procedures for committee assignment and Club action would be unchanged.

All ballot measures would continue to be studied by research committees unless, at the discretion of the Research Board, there was insufficient time to make a meaningful study or the importance of the issue involved would not justify the expense of printing a written report.

D. The procedures for handling research projects by the Research Board would be streamlined to eliminate any undue loss of time between the birth of a research idea and its culmination in a written or oral report to the Club membership.

As noted above, the members of the Research Board (except the First and Second Vice Presidents) would each be the Chairman of one of the Standing Committees in the ten general areas of interest. Each Research Board member would be expected to encourage the promulgation of new research ideas within his or her area of interest, and would also oversee each research committee within its area of influence.

After a Standing Committee has come forward with the draft of a research charge and a recommendation for a written report or an oral presentation, the charge shall be reviewed by the Research Board. The Research Board shall be authorized to give final approval or rejection to oral projects, and would recommend all proposed written projects to the Board of Governors. The Board of Governors shall give final approval to written projects, taking into consideration the cost of publication of such a report in relation to its importance to the membership.

All oral projects approved by the Research Board and all written projects approved by the Board of Governors would be assigned to the appropriate Research Board member by the Board Chairman, following group interest lines and work balance guidelines. The Research Board member to whom a project is assigned would recommend a chairman from the Standing Committee or prepare a committee chairman "ask list" from the Club membership. All names submitted shall be approved by the Research Board, and a committee chairman shall be selected from that list. The chairman selected shall prepare a committee members ask list with preference given to volunteers and with considerable emphasis given to the objective attitude of the members on that list. The ask list shall be approved by the Research Board and the committee chairman shall select members from that list. (The same procedure shall apply to ballot measure written reports.)

The Research Board members would thereafter monitor the activities of each committee and would be responsible for setting and maintaining timetables for progress.

The final draft of each written report and a written outline of each proposed oral report would eventually be submitted to the Research Board for review. The Research Board would approve a written report (if it so decides) in final form and would recom-

mend its acceptance to the Board of Governors. The Research Board would have final authority to approve or reject the proposed outline of an oral report.

The function of the Board of Governors in the entire research procedure would be limited to final approval or rejection of the original written charge for a written research report and to final approval or rejection of the final draft of the committee report. The Board of Governors would either accept the report in its presented form, return it to the Research Board for revision in accordance with written comments, or reject it completely and terminate the charge.

IV. CONCLUSIONS AND RECOMMENDATIONS

1. Research procedures followed by the City Club should be changed to provide for greater efficiency, timeliness and effectiveness and to involve a greater number of the Club members.
2. The plan set forth above should be adopted.
3. The following changes in the Constitution and Bylaws should be made:
 - a. Section 1 of Article IV of the Constitution, to provide that the Second Vice-President automatically succeed to the position of First Vice-President.
 - b. Sections 2 and 3 of Article II of the Bylaws, to reflect the revised duties of the First and Second Vice Presidents.
 - c. Section 6 of Article II of the Bylaws, to reflect the authority of the Research Board to initiate oral reports.
 - d. Section 1(a) of Article III of the Bylaws, to reflect the revised character of the Research Board. Section 1(b) to be deleted.
 - e. Section 1 of Article IV of the Bylaws, to restrict application only to written reports. A new section 7 to be drafted to accommodate the oral report format.

Respectfully submitted,

Research Board:

Charles W. Bursch
 William A. Comrie
 John L. Frewing
 Stephen B. Herrell
 Shirley M. Kennedy
 Boyd MacNaughton, Jr.
 James A. Nelson
 Peter A. Plumridge
 John F. Williams, Jr.
 Thomas L. Gallagher, Jr., *Chairman*

Project Planning Board:

Jack R. Brown
 Mary Anne Normandin
 Campbell Richardson
 William C. Scott, Jr.
 A. Thomas Niebergall, *Chairman*

Adopted by the Board of Governors April 14, 1975 and ordered printed as information to the membership. The proposed constitutional amendment contained in the Recommendation Section will require approval by vote of City Club members at a meeting for which the date will be announced.