

OCID Developing Equity and Engagement Strategy

Lessons Learned and Initial Framework to Guide Engagement Opportunities



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Document Overview and Purpose

The Oregon Child Integrated Dataset (OCID) is an objective, nonpartisan data resource for Oregon policymakers to improve outcomes for Oregon children and families. At the heart of the project is a commitment to building connections and learning from policymakers, state leaders, and diverse groups of child well-being policy stakeholders across the state. To guide this work, the OCID team is developing an equity and engagement strategy that draws on lessons learned from team experiences and from the shared wisdom of those whose guidance and feedback we have sought along the way. This document provides an overview of key insights to-date and how those lessons-learned have informed a preliminary equity and engagement framework to guide the OCID team in its engagement, analytic, and reporting decisions.

Through this exploration of lessons learned, we hope to bring context and transparency to the OCID project’s developing equity and engagement framework and contribute to the growing knowledge base for those engaged in data-to-policy initiatives across Oregon. By sharing OCID experiences and lessons, we seek to foster a collaborative and informed environment that advances the mission of leveraging data for effective policy decision-making to improve outcomes for all children in Oregon.

Project Description

OCID launched in 2019 with funding from the Oregon Legislature and 9 Oregon philanthropic partners. This unique resource aggregates data from across state agencies and provides a longitudinal record of public services received by children in Oregon since 2001. The integrated approach of OCID enables awareness of historical and current patterns that would otherwise be isolated in the siloes of individual programs and agencies. It also provides the opportunity to explore the well-being of Oregon's children by investigating the interplay of programs and services and illuminating outcome disparities and potential opportunities for policymakers. OCID receives data on programs administered through the Oregon Department of Education, the Oregon Department of Human Services, the Oregon Youth Authority, the Oregon Health Authority and the Oregon Department of Early Learning and Care.

The project's initial funding was used to build a data warehouse, develop analytic and project management capacity, launch a publicly available website including the OCID Child Well-being Dashboard, and conduct and publish preliminary analyses. During the 2021-2023 biennium, OCID began development of an equity and engagement strategy, successfully expanded the dataset to include more of Oregon's children and families, and served as a facilitator of data collaboration with partnering state agencies. Support from The Ford Family Foundation enabled the Center to recruit a Community Engagement Specialist in early 2023 to lead OCID engagement efforts.

For a more comprehensive update on the project's progress during the 2021-2023 biennium as well as current OCID project priorities, please see the OCID [Project Overview](#) page.

OCID Developing Equity and Engagement Goals

The goals described in this section will guide OCID equity and engagement efforts.

1. Gather, analyze, and share data to inform policy decisions

By gathering and analyzing data, and sharing findings with Oregon's child well-being stakeholders, the OCID project can contribute to meaningful policy discussions and informed, evidence-based decision-making. OCID data can highlight possible disparities, inequities, assets, and opportunities within our systems, offering policymakers valuable insights when discussing policy changes and interventions. By building our capacity to learn from and share with a diverse population of communities, leaders and stakeholders, we will work to support evidence-based policy discussions throughout the state.

2. Embed equity practices into OCID analyses and products

The OCID team intends to integrate the following equity practices into OCID analyses and products:

- **Racial Equity:** We will grow our understanding and apply lessons learned around the best practices for cross-sector data reuse and public reporting that center racial equity.
- **Intersectionality:** We will highlight the intersections of race/ethnicity, sex/gender, socioeconomic status, geography, and other forms of identity. Recognizing and highlighting these intersections will provide a more comprehensive understanding of opportunities and inequities.

- **Inclusive Knowledge Integration:** We will develop our capacity to integrate diverse perspectives and information sources into our research and will explore different approaches to disaggregating data.
- **Bidirectionality:** We will build our capacity to learn from and effectively share information with those who have learned and lived experience in the topics analyzed by the OCID project.
- **Transparency:** We commit to transparency about OCID governance processes, methodologies, resources, timelines, and limitations.

3. Ensure reporting from OCID is meaningful and actionable to policymakers and organizations

The work of OCID should be accessible and useful to policymakers, and to a range of communities and stakeholders. Ideally, OCID becomes a bridge between information and informed decision-making, ensuring the insights derived from OCID can be readily understood and used by Oregon organizations seeking to improve child well-being. By developing a more nuanced understanding of the unique needs and challenges faced by different communities within Oregon, OCID can contribute information that leads to the development of actions and policies addressing those needs and challenges. Insights from integrated, cross-program data can help foster collective understanding and collaboration among stakeholders focused on child well-being.

4. Include community perspectives in OCID analyses

By incorporating community insights and experiences, OCID research will gain depth and context that cannot be captured through quantitative data alone. The inclusion of community perspectives throughout OCID processes will contribute to a more nuanced interpretation of information and allow for identification of additional factors that may influence variations in outcomes, as well as the ability to make OCID information actionable. Understanding different viewpoints about what is working well and where inequities exist within particular communities—based on race/ethnicity, sex/gender, geography, disability, income, or any intersection of equity characteristics—can help us prioritize further inquiry that will be relevant and meaningful to the communities affected by the systems examined in OCID data.

OCID Equity and Engagement Efforts to Date

Over the first 2 biennia of the project, OCID engaged with a range of stakeholders to share information and obtain insights about how the project could successfully advance statewide and community child well-being goals. The following experiences contributed to the lessons-learned and developing framework outlined in this document:

- Developing an initial guiding methodology for integrating race and ethnicity information from multiple OCID data sources in collaboration with staff from the Oregon Health Authority's Office of Equity and Inclusion and key subject matter experts at other state agencies.
- Recruiting a Community Engagement Specialist for the OCID team to spearhead engagement planning and outreach through a partnership with The Ford Family Foundation.
- Presenting OCID analyses to key legislative committees, Governor's advisory committees, agency community forums, local public forums, and community groups.

- Sharing OCID data through [webinars](#) and online [data resources](#), such as interactive displays, short digestible briefs, and infographics.
- Convening a technical advisory panel of subject matter experts to advise on the application of an equity framework for OCID analyses that investigates the intersection between sex/gender, race/ethnicity, disability, and geography.
- Piloting a descriptive analysis on [students enrolled in alternative education schools](#), centered on the intersectional or interconnected nature of equity characteristics.

Additionally, the OCID team is currently participating, in partnership with Oregon's State Data Officer, in the [Equity in Practice Learning Community](#) through the Actionable Intelligence for Social Policy (AISP) at University of Pennsylvania. As part of AISP's network, the OCID team has been able to access technical assistance on how to center racial equity in integrated data projects, and to connect with a community of practitioners, policymakers, researchers, and stakeholders across the country who use and share cross-agency data to improve policies and programs.

Equity and Engagement Lessons Learned

This section describes 5 key lessons learned in the first 4 years of OCID, each contributing to the development of the project's equity and engagement framework:

- Equity-centered engagement takes time and careful planning.
- The use of administrative data presents both opportunities and limitations.
- Engagement is most effective when it is sustainable, meaningful, and mutually beneficial.
- Identity is complex and requires responsive and innovative analytic approaches.
- How we report OCID data has implications for equity.

1. Equity-centered engagement takes time and careful planning

Drawing from AISP's [Toolkit for Centering Racial Equity Throughout Data Integration](#) and other resources, the OCID team is taking time to build and test strategies to incorporate engagement and community voice throughout our projects.

An early iteration of our engagement strategy centered on quickly establishing a community forum to assemble coalitions of diverse community groups and stakeholders from around the state. While the team still intends to engage with Oregon community groups and incorporate community perspectives in future OCID analyses, it became less apparent whether a standing forum or committee would yield quality engagement. We are taking time to develop a more deliberate approach to cultivating meaningful and sustainable relationships. The team's participation in the Equity in Practice Learning Community yielded valuable lessons on the strategic planning and implementation of equitable stakeholder engagement practices.

OCID lessons about equity-centered engagement include:

- Develop a framework to guide our engagement strategy and to integrate equity practices into OCID analyses and products.

- Plan for forming relationships, building trust, formulating guiding equity practices, and developing new processes to all take time, trial, error, and patience.

FRAMEWORK QUESTIONS

These lessons led to building the following question into our equity and engagement framework:

- ◆ How are OCID equity and engagement practices reflected throughout the project?

2. The use of administrative data presents both opportunities and limitations

Administrative data are a critical tool for gathering information about Oregon children and families and pointing to trends that warrant further inquiry. That said, there are limitations to what can be learned or inferred from administrative data, especially when that data was originally collected for a purpose other than research.¹

In March 2023, the OCID team published an [overview](#) describing some of the strengths, limitations, and equity considerations of using administrative data and integrated data sets. The team is working to ensure we remain transparent about those limitations, and encourage users to view OCID data and analyses as jumping-off points for deeper exploration. We are also building our approach and capacity for enriching OCID data with supplemental information sources, including community and policy context.

OCID current lessons on using administrative data include:

- Center equity considerations throughout the research process.
- Identify and acknowledge the systemic and historical context underpinning the experiences or outcomes investigated in OCID analyses.
- Be transparent about and help educate audiences about the limitations of administrative data.
- Understand and communicate that the use of administrative data may unintentionally perpetuate and exacerbate inequity.
- Identify quantitative analysis as a first and not final step of inquiry.
- Communicate that administrative data can identify patterns, but cannot tell us why these patterns exist.

FRAMEWORK QUESTIONS

These lessons have led us to build the following questions into our equity and engagement framework:

- ◆ What trends or patterns in OCID analyses point to possible inequities in experiences and outcomes that warrant further inquiry?
- ◆ What information do stakeholders need to advance or improve their work in these areas?
- ◆ How can the OCID project best communicate the limitations of quantitative analyses using administrative data, and what resources or guidance can we share to help users fill in the gaps with additional inquiry?
- ◆ How can OCID bring community voice, narratives, and added perspectives to our analyses?

¹ https://januaryadvisors.shinyapps.io/ruo-data-dashboard/_w_980d9be0/#Interpretation

- ◆ What supplementary sources of information and research methods can the OCID project use to contextualize each analysis?
- ◆ How will OCID communicate equity considerations in its analyses and products?

3. Engagement is most effective when it is sustainable, meaningful, and mutually beneficial

Engagement efforts should value everyone’s time, contributions, and perspectives to facilitate and support meaningful, mutually beneficial, and sustainable exchanges. The OCID team has heard from community representatives who have been asked by public and private policy bodies and researchers to “provide their input” without reciprocity of information and value. An approach that prioritizes meaningful engagement and values these contributions can reduce the risk of tokenization, burnout, and inequitable access to the policymaking process for community representatives.

Tokenization, in this context, refers to the potential inclusion of individuals or groups for symbolic representation without genuinely integrating or considering their perspectives. It also encompasses a propensity to make assumptions about someone’s experiences based on a single aspect of their identity, and extends to a belief that we can understand an entire community’s needs by hearing from a few representatives.² Burnout refers to the potential emotional, mental, and physical exhaustion experienced by community representatives from the potentially burdensome or overwhelming demands placed on them.³

OCID lessons about sustainable, meaningful, and mutually beneficial engagement include:

- Structure the engagement of new partners and community voices around specific topics of analysis or geographical subsets within Oregon.
- Align requests and activities with the interests and availability of those engaged.
- Avoid placing burden on a single group or subset of community partners to give input on every topic we explore.
- Meet community groups in settings that work around their schedules, reduce their costs and other burdens associated with engagement, and explicitly ask how OCID can provide value.
- Learn which communication approaches allow our research to be meaningfully understood and used by different community groups and stakeholders.

While not claiming to be universally representative, the insights gained through meaningful engagement remain valuable. We hope to convey the richness of diverse perspectives while avoiding overgeneralization or misrepresentation of the varied experiences within Oregon.

² <https://results4america.org/wp-content/uploads/2019/12/Tokenization-Handout-and-Worksheet.pdf>

³ https://cms.childtrends.org/wp-content/uploads/2023/03/AECFResearcherReport_ChildTrends_Feb2023.pdf

FRAMEWORK QUESTIONS

These lessons have led us to build the following questions into our equity and engagement framework:

- ◆ How do we determine which communities (e.g., demographic, geographic, topical) to engage with about a given analysis, and when is that engagement most productive?
- ◆ What value will engagement with OCID have for stakeholder groups?
- ◆ How do we shape our engagement approach in a way that is accessible, and lays out a clear vision of what participants can expect to provide and receive for their time, energy, and expertise?
- ◆ How will we bring stakeholder voices into the process by which the team identifies and prioritizes topics for future analyses?
- ◆ How do we communicate findings to different audiences?
- ◆ What lessons can be used to enhance OCID practices and inform any phase of future work?

4. Identity is complex and requires responsive and innovative analytic approaches

OCID brings data from 5 different state agencies into a single unified dataset. Demographic and other characteristics are collected differently across these data sources. For example, most programs and agencies have different data definitions, collection methods, and reporting practices for race and ethnicity, which are not easily reconciled. The OCID team constructed an initial method to integrate race and ethnicity data from several data sources across multiple years. The team consulted with subject matter experts to develop the OCID project's approach, and published an initial [guiding methodology](#) that reflects the equity considerations applied through this approach.

However, there are limitations to the current OCID approach that prevent a broader spectrum of racial and ethnic identities from being represented. For example, current OCID methodology does not capture the intersections of multiple racial/ethnic identities. The team is continuing to assess how we bring new approaches to the exploration of identity attributes (see Intersectional Equity Characteristics box below). OCID key lessons-learned on approaching identity include:

- Avoid binary thinking when possible in data analysis and reporting, which can limit understanding of the richness and complexity of human experiences. For example, people are not simply either rural or urban, Hispanic or non-Hispanic, male or female. Identities are multifaceted and a product of their intersecting experiences and identity components.
- Build methodologies to leverage data that shows the diversity and intersectionality of identity characteristics. This means using diverse thought partners to help explore ways that variables such as geography and race/ethnicity, as well as analyses that explore those variables, reflect the texture and complexity of identity.

FRAMEWORK QUESTIONS

The OCID team is working to ensure we ask ourselves and our stakeholder partners how we deepen or broaden our perspective. These lessons have led us to build the following questions into our equity and engagement framework:

- ◆ Does disaggregating OCID data by race/ethnicity, sex/gender, geographical, or disability lenses, and additional forms of identity lend new insights into the experiences of different subgroups in Oregon?

◆ What alternative methods could be explored for additional insights into the data?

Intersectional Equity Characteristics

The OCID team will apply an equity framework to its analyses and data products that includes race/ethnicity, sex/gender, geography, and disability status. Current application and future improvements include:

Characteristic	Current Data Approach	Potential Future Directions
Race/Ethnicity	Apply initial framework for integrating race/ethnicity information from multiple OCID data sources	Improve understanding and engage with community stakeholders on disaggregation and display
Sex/Gender	Integrate across data sources, typically limited to male/female designations	Develop sex/gender methodology that includes nonbinary identification
Geography	Group counties as metro, urban, or rural based on largest city populations	Explore smaller geographic units that would allow more nuanced analysis inclusive of Oregon’s rural areas, and link to external data providing community and environmental context
Disability	Define as having an individualized education program (IEP)	Incorporate data from other programs to develop a more nuanced disability definition

5. How we report OCID data has implications for equity

The OCID team is actively exploring best practices in communicating research findings, including how to display disparities, inequities, and assets experienced by the populations represented in analyses. Our lessons learned about sharing information include:

- Sharing information without an equity lens or an understanding of historical context can reinforce systemic inequity and perpetuate bias, even when the intention is to promote equitable outcomes.
- While it is important to highlight outcome disparities and potential opportunities to meet the needs of all children, we should also consider how to communicate what is known about the systemic and structural basis for these inequities.
- Highlighting inequities has the potential to trigger emotional, mental, and somatic responses, even when the information is compelling, educational, and grounded in context.
- A diverse range of stakeholders should be engaged to build language into presentations and analyses to prevent the perpetuation of stigma, stereotyping, and bias.

FRAMEWORK QUESTIONS

These lessons have led us to build the following questions into our equity and engagement framework:

- ◆ How should OCID share information about potential disparities and opportunities to improve child well-being?

- ◆ How can we communicate findings in a way that minimizes emotional, mental, and somatic triggers?

Into Action: Embedding Equity and Engagement Throughout OCID Processes

The lessons outlined above have been used to develop a preliminary framework to guide equity and engagement considerations throughout the phases of OCID analyses. These phases represent key decision points that can impact the trajectory of an analysis.



This working framework is adapted from the [data life cycle model used by AISP](#) to reflect the OCID project life cycle and to identify opportunities for stakeholder engagement at each phase of work.

By defining and putting into practice key considerations to be addressed at each phase of work (see Equity and Engagement Framework below), we have identified opportunities to engage as a team and with stakeholder groups and communities who may be interested in or affected by OCID analyses. We will continue identifying opportunities for engagement using established forums and partnerships with state agencies, and we will also seek out new relationships with cross-sector organizational and system leaders, coalitions and advocacy groups, grassroots organizations, and others working with and on behalf of affected populations of youth and families. Initially, these groups will be identified based on their connection to the topics prioritized for analysis by the OCID Governance Committee. As we increase our capacity, we hope to build-in mechanisms for bringing additional stakeholder voices into the process by which the Governance Committee and the team identifies and prioritizes topics for future analyses.

We are continuing to integrate lessons from our initial engagement efforts and are seeking new learning opportunities for the team to expand their understanding and application of equity and

engagement approaches. The team is taking an iterative, long-term approach, and will regularly review and revise our equity and engagement framework based on new lessons learned.

Equity and Engagement Framework

OCID Phase	Equity and Engagement Objectives	◆ Engagement Questions
Topic Selection	<p>Identify consistent outcome disparities in OCID data, such as race/ethnicity, geography, sex/gender, and disability</p> <p>Integrate input from stakeholders about the topics and populations to be considered for analysis</p>	<p>What trends or patterns exist in OCID analyses that point to possible inequities in experiences and outcomes warranting further inquiry?</p> <p>How will we bring stakeholder voices into the process by which the team identifies and prioritizes topics for future analyses?</p> <p>What information do stakeholders need to advance or improve their work in these areas?</p>
Planning	<p>Identify stakeholder groups and their interest and needs</p> <p>Bring further context and community perspective to OCID data</p>	<p>How do we determine which communities (e.g., demographic, geographic, topical) to engage around a given analysis, and when is engagement most productive?</p> <p>What value will engagement with OCID have for stakeholder groups?</p> <p>How do we shape our engagement approach to meet stakeholders in a way that is accessible, and has a clear vision of what participants can expect to provide and receive for their time, energy, and expertise?</p> <p>What is the OCID project’s capacity and approach to bringing community voice, narratives, and added perspectives to administrative data?</p> <p>What supplementary sources of information and research methods can the OCID project use to contextualize each analysis?</p>
Analysis	<p>Integrate supplemental information</p> <p>Disaggregate data and analyze intersectional experiences</p> <p>Consider methodology</p>	<p>How will supplemental information be used in OCID analyses and products?</p> <p>Does disaggregating OCID data by race/ethnicity, sex/gender, geographical or disability lenses, and additional forms of identity lend new insights into the experiences of different subgroups in Oregon?</p> <p>What alternative methods can be explored to give additional insights into the data?</p>

OCID Phase	Equity and Engagement Objectives	◆ Engagement Questions
Dissemination	Share data and findings with stakeholders	How do we communicate findings to different audiences?
	Communicate outcome disparities and opportunities	How should OCID share information about potential disparities and opportunities to improve child well-being? How can we communicate findings in a way that minimizes emotional, mental, and somatic triggers?
	Be transparent about OCID equity considerations	How will OCID communicate equity considerations in its analyses and products?
Gathering and Processing Feedback	Learn what was helpful/actionable	What modes of dissemination most effectively conveyed OCID information to different audiences?
	Review guiding practices	Were OCID guiding equity and engagement practices reflected throughout the current project?
	Refine approach	What lessons can be used to enhance OCID practices and/or to inform any phase of future work?

Acknowledgment

The Center acknowledges The Ford Family Foundation’s support of the OCID project’s equity and engagement efforts. The Foundation’s contributions have been instrumental in our team’s efforts to develop strategies to foster an informed and collaborative environment for effective policy decision-making among stakeholders focused on child well-being.

